

THE COPPER MOUNTAIN PROJECT: FINANCIAL ANALYSIS AND SUSTAINABILITY
PLAN FOR THE COPPER MOUNTAIN FOUNDATION A 501(C)

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A
PROJECT

Presented to the Faculty
Of the University of Alaska Anchorage

In Partial Fulfillment of the Requirements
for the Degree of

MASTER OF SCIENCE

By

Angela Totemoff, MBA

Anchorage, Alaska

December 2015

**The Copper Mountain Project: Financial Analysis and Sustainability Plan for the Copper Mountain
Foundation A 501(C) 3**

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December 6, 2015

READ ME FIRST

Project: The Copper Mountain Project: Financial Analysis and Sustainability Plan for the Copper Mountain Foundation A 501(C) 3

Final Submission Checklist

Deliverable	Location
Final report, to include one hard copy of complete report, appendices, mandatory deliverables and PowerPoint presentation. One copy will be placed in tabbed binder provided by Department for MSPM library with a CD of complete copy of electronic files	Section 1 of PDF File
2-3 page summary narrative of project lessons learned included in separate section of project binder	Section 2 of PDF File
Narrative on 3-4 Knowledge Areas processes applied and measured during project to demonstrate mastery	Section 4 of PDF File

Master of Science Project Management

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ABSTRACT

The Copper Mountain Foundation (herein referred to as CMF) is a 501 (c) 3 non-profit that is fully funded, fully operated, and established by The Tatitlek Corporation (herein referred to as TTC). CMF currently has a program that provides scholarships and career grants for original enrollees and descendants of original enrollees of TTC. To be eligible to receive funding, a student must be an original enrollee of TTC or a lineal descendant of an original enrollee (by birth or adoption). Original enrollees of TTC either resided in the Native Village of Tatitlek or their families resided in Tatitlek at the time of enrollment in TTC. Today, scholarship applicants very often continue to come from a rural area within Alaska such as the Village of Tatitlek. The college graduation rate of rural students continues to be one of the lowest in the state. To address this problem, CMF created the scholarship program to offer financial assistance for education and career certificates for the enrollees. The CMF Board of Directors have expressed an interest in creating a Financial Analysis and Sustainability Plan to gain financial sustainability. The financial health of TTC has enabled the programs in CMF to be fully funded. However, securing additional funds diversifies CMF's financial portfolio making them more financially stable, securing scholarships and career grants for the shareholder and descendants of the TTC. The goal of financial sustainability ensures that the programs will continue at the same rate of funding. The purpose of the Copper Mountain Project was to provide a robust Financial Analysis and Sustainability Plan that would provide the Board of Directors a clear understanding of the financial state of CMF and a guide as they pursued funding endeavors. This final report contains the project methodology used to produce the product, the research methodology used to conduct the research, conclusions about the product and research, and recommendations for further research.

KEYWORDS

Alaska Native Corporation
Scholarships
Career Grants
Non-Profit Organization
Alaska Native Graduation Rates
Financial Sustainability Plan
Financial Analysis

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DICTIONARY

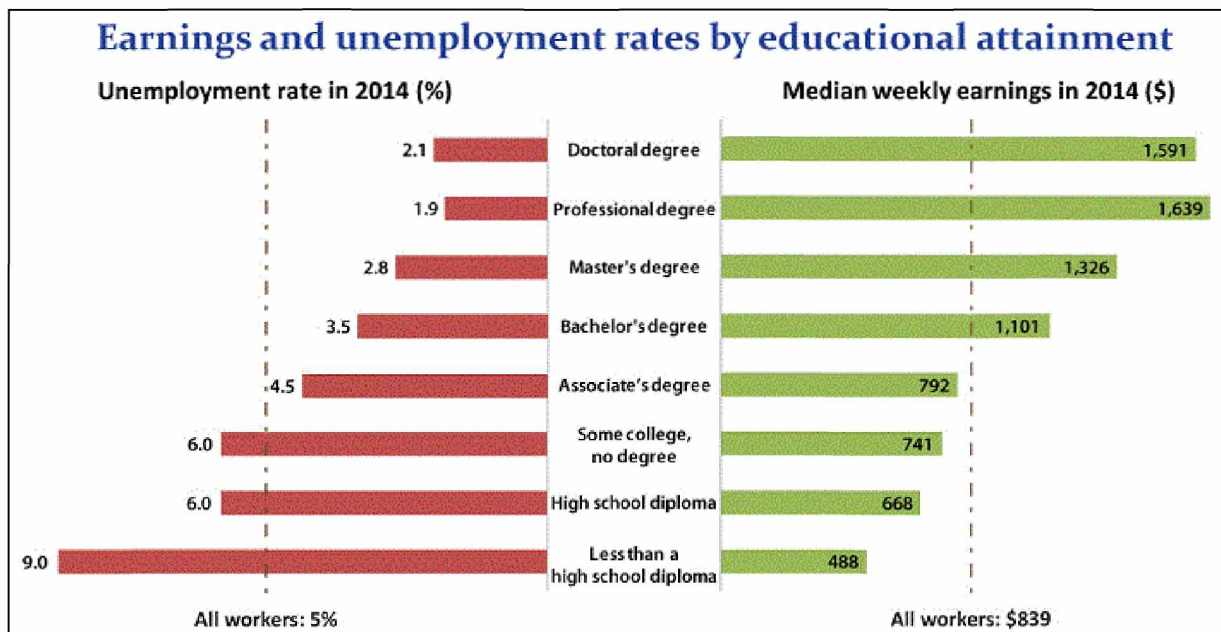
CMF – COPPER MOUNTAIN FOUNDATION

TTC – THE TATITLEK CORPORATION

INTRODUCTION

The graduation rate for Alaska Natives in high school and college is far below the national averages. Further, economic conditions including poverty levels, unemployment rates, and high school drop-out rates among Alaska Natives are above national averages. As a result Alaska Native families, on average, have less income to pay for college and other professional training opportunities. This situation is not only significant to TTC, but to all Alaska Native Corporations because 100 percent of the original shareholders were Alaska Native living in the very regions that the modern day corporations currently represent. Today, a large percentage of the shareholders and shareholder descendants are still Alaska Native, living within Alaska, who are included in the statistics stated above.

The mission of Tatitlek Corporation is to work to provide financial benefits as well as create opportunities for the shareholders and descendants. To address this educational and financial need, CMF, a non-profit 501 (c) 3 corporation, was created by TTC to be a vehicle through which shareholders and descendants could benefit from through the use of scholarships and career grants. Research suggests that people who complete high school and college have higher paying jobs and lower rates of unemployment. Consider the Exhibit 1 – Earnings and unemployment rates by educational attainment, from the Department of Labor.



Note: Data are for persons age 25 and over. Earnings are for full-time wage and salary workers.
Source: Current Population Survey, U.S. Bureau of Labor Statistics, U.S. Department of Labor.
www.bls.gov/emp/ep_chart_001.htm

EXHIBIT NO. 1: EARNINGS AND UNEMPLOYMENT RATES BY EDUCATIONAL ATTAINMENT

The Chairman of TTC has also mentioned that his dream is to have the corporation be 100 percent run and operated by the owners of the company, the shareholders. To that end, the CMF works hard to promote their scholarship and career grant program. This program offers financial awards to shareholders and descendants who are seeking post-secondary education, vocational training or professional training. The success of the CMF is important because it addresses the need for higher education for our shareholders and our community. Financial sustainability is important to achieve because it secures future scholarships and career grants that are available to shareholders and descendants.

BUSINESS CASE

Part of the mission statement of TTC states that “we strive to bridge the traditions of our village with global economic opportunity enhancing the quality of life for our shareholders.” CMF is an important vehicle that provides financial assistance to achieve that goal of enhancing shareholders’ lives. Therefore, ensuring that these scholarship and career grant programs continue to be offered verifies that TTC is fulfilling its mission.

PROJECT PURPOSE

The purpose of this project is to create a Financial Analysis and Sustainability Plan for CMF, which provides guidance on possible revenue making endeavors to support the scholarship and career grant programs that are within the capabilities of the organization. When complete, the Copper Mountain Project will increase understanding of the organization’s scholarship and career grant programs and services, and provide a goal for on-going financial growth and sustainability.

SCOPE DESCRIPTION

The scope of this project included planning, execution, and monitoring and controlling the creation a Financial Analysis and Sustainability Plan for CMF. The plan includes current organization financial analysis and a financial development plan. The scope includes a Project Management Plan, a Financial Analysis and Sustainability Plan, a final presentation, and a project report.

PROJECT OBJECTIVES

- Demonstrate mastery of MSPM Program Learning Outcomes.
- Create documents that meet the requirements of PM 686A and PM 686B.
- Create a Project Management Plan.
- Execute and Monitor the Project Management Plan.
- Collect, analyze and include research information in a written report.
- Create a Financial Analysis and Sustainability Plan for CMF.
- Present results to public audience.

BACKGROUND

The Native Village of Tatitlek is home to a federally recognized Aluutiq tribe, and is located in the front of Copper Mountain along the Tatitlek Narrows in the Prince William Sound. The community currently has 65 year round residents. Tatitlek is not connected to the state road system, and is only accessible by 2-15 passenger planes, and boats. The infrastructure of the community consists of a community school (PreK- 12th grade), a clinic, a community office building, a museum, two churches, a water plant, a power plant, an airstrip facility, and 4 warehouses. In addition to the facilities, Tatitlek also has a 3500 foot airstrip and a ferry dock. (Our History, 2014)



Source: <https://www.chugachmiut.org/Tribes/tatitlek.html>

EXHIBIT NO. 2: TRIBES

The Aluutiq culture and subsistence lifestyle are an important aspect of the community member's lives. Many residents are subsistence hunters and gathers, collecting salmon, halibut, rock fish, herring, deer, goat, clams, lichen, seaweed, salmon berries, and blueberries during the summer and fall months. The Aluutiq language, dancing and arts and crafts are taught at home, as well as, in the school. (Our History, 2014)



Photo Credit: The Tatitlek Corporation

EXHIBIT NO. 3: ARIEL PHOTO OF TATITLEK

An Alaska Native Corporation, herein referred to as an ANC, is a corporation that was established through the passing of the Alaska Native Settlement Act, herein referred to as ANCSA.

On December 18, 1971, Public Law 92-203, the "Alaska Native Claims Settlement Act," was signed into law by President Nixon. Public Law 92-203 was enacted by Congress to settle the claim of Alaska's native Indian, Aleut and Eskimo population to aboriginal title to the land on which they have lived for generations. This claim had been unresolved during the more than 100 years since the U.S. purchased Alaska from Russia in 1867.

Under provisions of the settlement, the Natives received title to a total of 40 million acres, to be divided among some 220 Native villages and twelve Regional Corporations established by the Act. The twelve Regional Corporations (together with a thirteenth Regional Corporation comprised of Natives who are non-permanent residents of Alaska) were to share in a payment of \$462,500,000 (to be made over an eleven-year period from funds in the U.S. Treasury), and an additional \$500 million in mineral revenues deriving from specified Alaska lands. (Jones, 1981)

The Chugach Regional Corporation, one of the twelve Regional Corporations established, is located in south central Alaska. Below is a chart of the territory for each Regional Corporation.



Source: <https://www.alutiiq.com/wp-content/uploads/2012/06/Native-8a-Briefing.pdf>

EXHIBIT NO. 4: REGIONAL ALASKA NATIVE CORPORATIONS



EXHIBIT NO. 5: CHUGACH REGION IN YELLOW

The Native Village of Tatitlek was among the 220 native villages that established a corporation under ANCSA within the Chugach Region. In 1973, TTC opened its doors for business. The mission of the company is to provide

services and products to their customers while ensuring stewardship of all assets and connections to their lands. The principles that they use to carry out their mission stem from the culture of the people of Tatitlek: resilience, ethics, accountability, unity, respect, and community.

The land entitlement of TTC is currently 72,394 acres of subsurface estate. The business lines of TTC are IT Services, Human Resource Services, and Construction in the federal and public sectors. The corporation currently has 357 shareholders and 120 registered descendants.

Corporate benefits offered to the shareholders of TTC include:

- Quarterly Dividends
- Quarterly Elder Distributions
- Purchases of Shareholder Artwork
- Assistance with economic growth, tribal governance, public safety for the community of Tatitlek
- Financial and management support for strategic planning for the community of Tatitlek
- Employment-to-Life skills counseling

CMF is a 501 (c) 3 non-profit corporation that is fully funded, fully operated, and established by TTC. CMF provides financial assistance to original enrollees and descendants of original enrollees of TTC. To be eligible to receive funding, a student must be an original enrollee of TTC or a lineal descendant of an original enrollee (by birth or adoption). Original enrollees of TTC either resided in the Native Village of Tatitlek or their families resided in Tatitlek at the time of enrollment in TTC.

Today functions of CMF include managing and operating all financial assistance programs including:

- Academic scholarships
- Career grants
- Youth grants
- Burial assistance
- Funding and project coordination for:
 - Peksulineq – Tatitlek Cultural Heritage Week
 - Tatitlek Church Renovation Project

LITERATURE REVIEW

Alaska Native graduation rates are lower than the national average because of poor economic conditions among Alaska Natives, and cultural differences.

To add context to Alaska Natives in the state, it's important to know the history of the people and the challenges they face in terms education and economic gains. Alaska Natives have thrived on the territory of we call "Alaska" for over 10,000 years. In 2009, there were approximately 122,000 Alaska Native people living in the State. This equates to approximately 22 percent of Alaska's population. In the 1700s it was estimated that approximately 50,000 Alaska Native People lived in Alaska. When the Russians and Americans came to Alaska they introduced diseases such as smallpox and influenza which was devastating to the Alaska Native population and as a result there was a decrease between the 1700s and 1900s. (Martin & Hill, 2009).

In 1959, Alaska became a state. 85 percent of the Alaska Natives lived in rural communities, or small villages that were challenging to access. In 1976, many of these small communities still did not have a high school. That year, as a result from a lawsuit against the state, Alaska Native students fought to have equal access to education. The result was the creation of 100 community schools in rural Alaska. At the time barely half of the Alaska Natives, 25 years and over had received high school diplomas, compared to 88 percent in Alaska's urban areas. From 1980, immigration became very popular. By the year 2000 nearly 40 percent of the rural residents moved into urban areas and 75 percent Alaska Natives 18 and older, had received a diploma. (Erickson & Hirshberg, 2008). Despite these educational gains, the graduation rate continues to lag behind national averages.

High school graduation rates among Alaska Natives are lower than the national average. Graduation rates of all Alaskan students were calculated to be approximately 70 percent. The graduation rate among Alaska Natives was 54 percent, a difference of 16 percent. College graduation rates at the University of Alaska Anchorage also paint a grim picture. Despite the 40 percent increase in enrollment since 2000, only five percent of graduates in 2007, were Alaska Native. (Frazier, Wheeler, Spiers, Kirby, & Mielke, 2015)

Dropout rates among Alaska Natives are higher than national averages. Compared to national averages, Alaskan high school dropout rates are highly volatile ranging from eleven percent to five percent from one year to the next. By contrast the national high school dropout rate has been steadily declining from eleven percent in 2000, to five percent in 2011. Please see Exhibit No. 6 below:

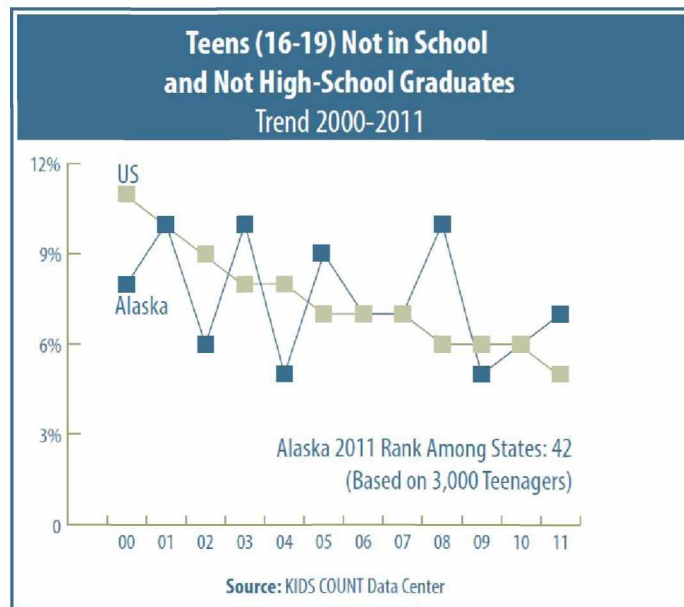


EXHIBIT NO. 6: TEENS (16-19) NOT IN SCHOOL AND NOT HIGH-SCHOOL GRADUATES

Examining the data by race, Alaskan Native students have on average, a 12 percent dropout rate as compared to Caucasian students who have on average a 2 percent dropout rate with-in the state. Comparatively, Alaska Natives have the highest dropout rate compared to Asian/Pacific Islander, Hispanic, Black, Non-Hispanic, and White, Non-Hispanic races. Please Exhibit No. 8 below.

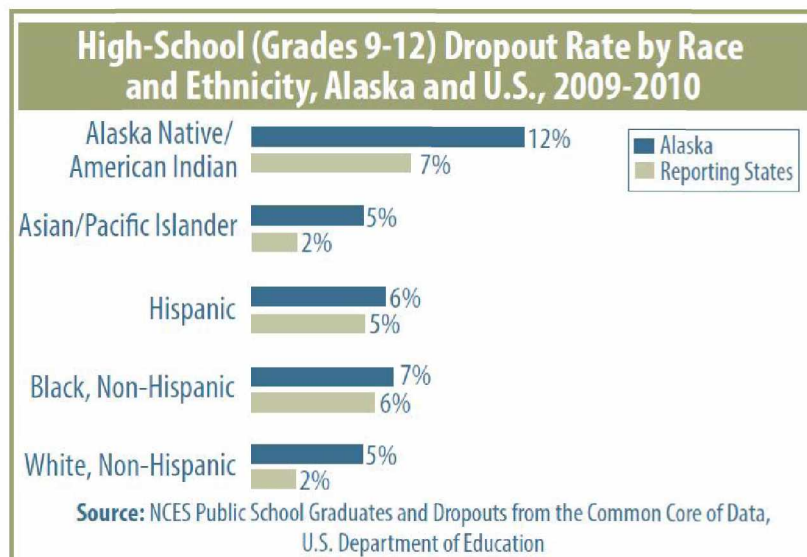


EXHIBIT NO. 7: HIGH-SCHOOL (GRADES 9-12) DROPOUT RATE BY RACE AND ETHNICITY, ALASKA AND U.S., 2009-2010

Graduation rates are important to consider because the level of unemployment increases when the level of education decreases. According to Kids Count 2013-2014 Data Book, “Americans who don’t graduate from high school are more likely to be unemployed, have limited job options, rely on government health-care and other aid programs, and become teenage parent.” Additionally, a high school diploma is the minimum requirement for many jobs in Alaska. (Frazier, Wheeler, Spiers, Kirby, & Mielke, 2015) Please see Exhibit No. 9 below.

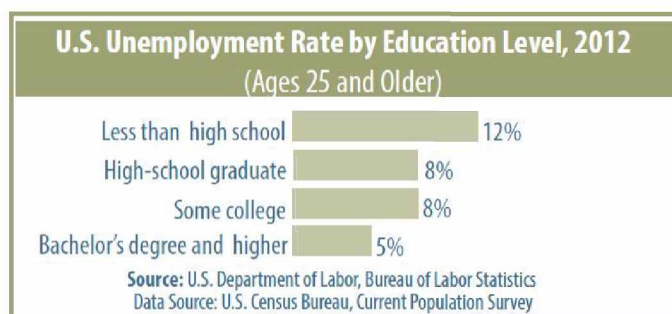


EXHIBIT NO. 8: U.S. UNEMPLOYMENT RATE BY EDUCATIONS LEVEL, 2012

While Alaska Native graduation rates are below national averages, and dropout rates in high school and in college are above national averages, data also shows that income levels of Alaska Native are also below the national averages

Despite Alaska Natives accounting for approximately 22 percent of Alaska’s population economic conditions are significantly lower than national averages. The following Exhibit No. 10 shows a larger percentage of Alaska Natives living below the poverty line, higher unemployment, and more adults not in the workforce, compared to all Alaskans and all Americans. Additionally, Alaska Natives have lower percentage of working plumbing in households and less median household income compared to all of Alaskans and Americans. (Martin & Hill, 2009)

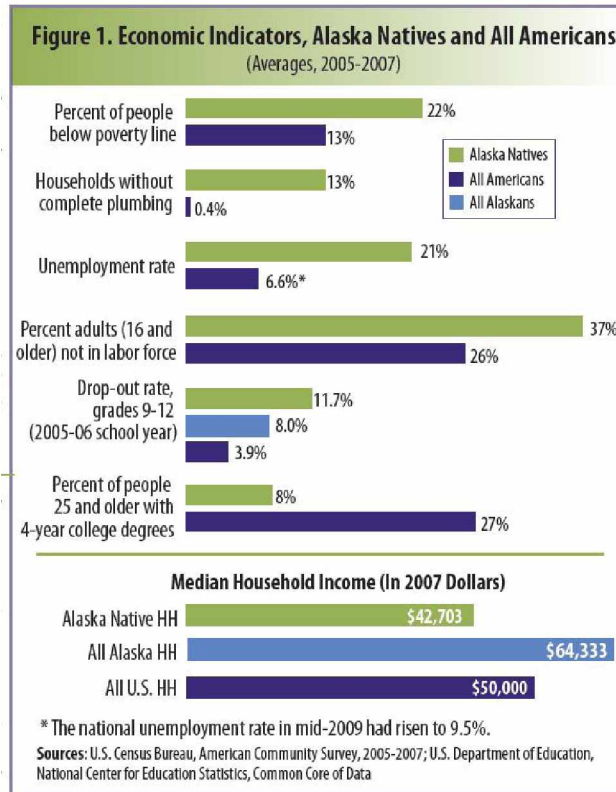


EXHIBIT NO. 9: FIGURE 1. ECONOMIC INDICATORS, ALASKA NATIVES AND ALL AMERICA

The findings above conclude that graduation rates of Alaska Natives are lower than national averages.

According to the last census, the village of Tatitlek has an unemployment rate of 8.9% and a median household income of \$21,563, approximately half of the Alaska Native Median Household income state in the above graph. (Tatitlek, AK, 2015)

RESEARCH METHODOLOGY

The method used for the project was analysis of a scholarship and career grant database provided by the Shareholder Services Department in TTC. The Shareholders Services Department agreed to provide the number of graduates they have had and the number and amount of scholarships and career grants they have given out per year. No personal information was provided about the scholarship recipients.

The project manager received the database that contained the number of shareholders and descendants that have received a scholarship or career grant, and number of shareholders and descendants that have graduated with a degree and the amount awarded per year to shareholders and descendants for scholarships since 1991. Please see Appendix 2 for the full Tatitlek Student Database.

The intent is to try to find a relationship between the Total Awards and Total Graduates. The project manager will examine the correlation between the Total Graduates vs. the Total Awards using the Correlation Coefficient, or the Pearson Function. “The correlation coefficient, denoted by r , is a measure of the strength of the straight-line or linear relationship between two variables. The correlation coefficient takes on values ranging between +1 and -1.” (Bruce Ratner) A correlation coefficient of +1.0 indicates a perfect, positive correlation, and a -1.0 is a perfect, negative correlation. The formula for the Pearson product moment correlation coefficient, r , where x and y are the sample means $AVERAGE(array1)$ and $AVERAGE(array2)$, is:

$$r = \frac{\sum (x - \bar{x})(y - \bar{y})}{\sqrt{\sum (x - \bar{x})^2 \sum (y - \bar{y})^2}}$$

The project manager utilized Microsoft excel CORREL(array 1, array 2), function to analyze the correlation between the number of scholarships and career grants and the number of graduates per year. The resulting correlation value (x) means that for any number of scholarships awarded, you could reliably predict the number, within x percentage of accuracy.

DATA ANALYSIS

The following exhibit is a chart that resulted from graphing the number of scholarships and career grants that were awarded to individual shareholders and descendants (Total Awards) and number of shareholders and descendant that graduated that year (Total Graduates per year) from 1992 to 2015.

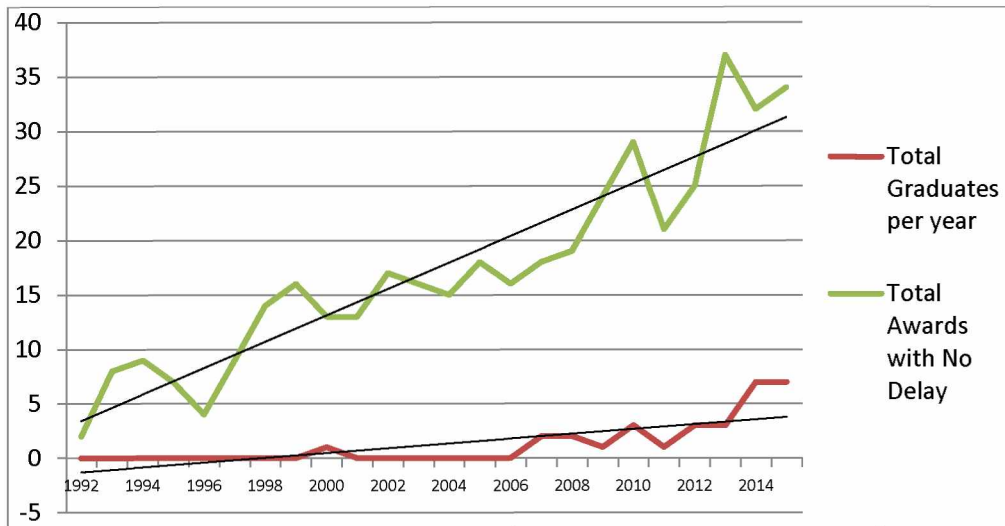


EXHIBIT NO. 10: TOTAL AWARDS WITH NO DELAY VS. TOTAL GRADUATES PER YEAR

The data shows the number of student recipients steadily increasing from one recipient in 1991, to 34 recipients in 2015. This implies that the number of shareholders and descendants seeking higher education is also increasing. The number of graduates has also increased from two in 2000, to seven in 2015.

The correlation between the Total Awards with No Delay vs. Total Graduates per year is 0.79.

To account for the delay in number of graduates due to the time it takes to receive a degree an analysis was done by adding a two year delay and a four year delay to the Total Awards to see if this impacted the correlation between Total Graduates per year and Total Awards.

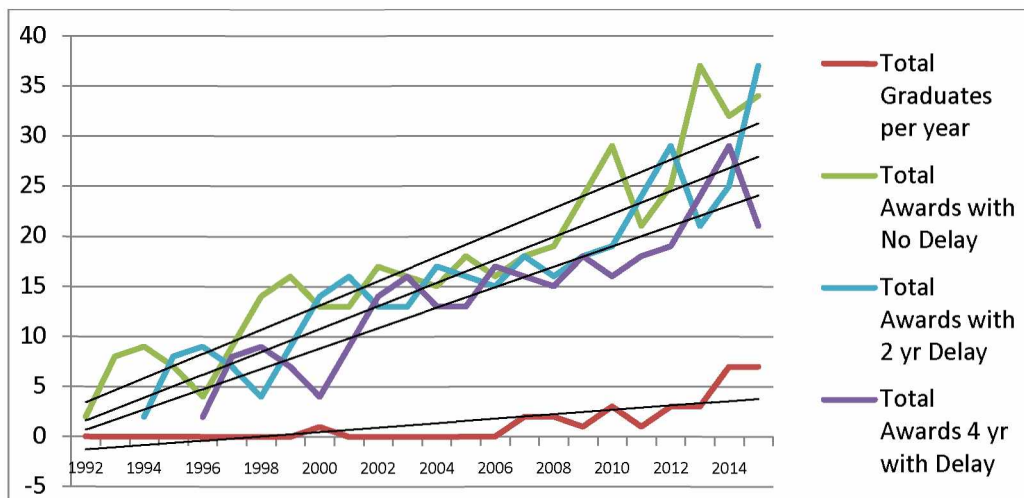


EXHIBIT NO. 11: TOTAL AWARDS WITH 2-4 DELAY VS. TOTAL GRADUATES PER YEAR

The correlation between Total Graduates per year and Total Awards with 2 yr. Delay had a correlation coefficient of 0.78. The correlation between Total Graduates per year and Total Awards with 4 yr. Delay had a correlation coefficient of 0.71. Both were less than the correlation coefficient that resulted from the correlation between Total Graduates and Total Awards with No Delay. These findings were unexpected. It was expected to see a higher correlation with the 2-4 year delay.

All correlation coefficients were all above 0.70, resulting in all having a strong relationship (Bruce Ratner). Since all had a strong relationship, the Total Awards with 2 yr. Delay and Total Awards with 4 yr. Delay arrays were discarded and the correlation coefficient between Total Graduates per year and Total Awards with No Delay was considered during the conclusions and recommendations.

PROJECT METHODOLOGY

As a graduation requirement for the Project Management degree program at the University of Alaska Anchorage, each student was to develop a capstone project. Each project was subject to requirements set by the Project Management Program within the Engineering, Science and Project Management Department at the University of Alaska Anchorage. This project was formulated through numerous discussions with academic and corporate stakeholders to produce a project deliverable that was relevant to the work done in the Shareholder Services Department at TTC. The project manager of this project was the manager of the Shareholder Services Department, who managed administrative functions, programs, and community development projects for the Native Village of Tatitlek.

The project manager worked with the student's academic committee to narrow down the scope of the project. While considering time and resource limits, and after several iterations of the project scope, the final scope was focused on a financial sustainability plan for scholarship and career grant programs within CMF. Based on the need for financial sustainability, the project manager worked with the Shareholder Services Team and CMF board members to develop stakeholder requirements and focus the plan on the needs of the organization. One of the CMF board members was chosen to be the project sponsor.

In 2014, the CMF Board of Directors directed the Shareholder Services Department to devise a plan to achieve organizational financial sustainability with the intent to secure funding for current programs and diversify the CMF portfolio.

This project was built using the five process groups outlined in The Project Management Book of Knowledge (PMBOK), initiating, planning, monitoring and controlling, and closing. The complete plan can be found in the appendices. Below is a description of the project execution. Details of the thought processes and issues encountered are written below.

INITIATION

During the initiation of this project, the scope and project charter were created in January 2015. A sponsor was chosen and a three-person student advisory committee was established.

One unique challenge to the project was the additional stakeholder, the student advisory committee. This committee had a high interest and high power in the project, overseeing the application and mastery of project management principles. One of the first tasks was to choose the committee members. This three person committee had to consist of at least two full-time and adjunct ESPM faculty. There was an option to choose a non-faculty member, however, the project manager chose not to for several reasons. The first reason was time constraints. Due to course requirements, time was a hard limit. To choose a person that was not a full-time or adjunct faculty member, the project manager would have had to submit a petition to the ESPM staff for processing. This would have added additional time to an already strained schedule. Secondly, having three, full-time ESPM faculty had the advantage of each member that was already familiar with the requirements of the committee. This would shorten the schedule since there would be no need for committee training. Further, this decision also guaranteed input from experienced members with a history in project management.

When the project manager was brainstorming how to shape this project, she wanted it to be relevant to her work in shareholder services, CMF, the Native Village of Tatitlek or the Native community in Alaska. In mid-January, 2015, one of the early ideas was to create a community development plan for the Native Village of Tatitlek. Olen Harris, the President of North Pacific Rim Housing Authority was asked if he would be willing to talk about the project. Olen was a great resource because his organization builds and manages the bulk of the infrastructure in the rural Chugach region. They discussed several projects that were currently being developed and executed. A community development plan was suggested. However, Olen explained that a company called ION was already in the middle of creating a community development plan for all of the communities in the Prince William Sound. So the project was rejected.

Olen shared that they were pursuing a grant for new teacher housing in Tatitlek. He suggested the project involve completing and submitting that grant application. On January 28, 2015, Roger Hull, the lead student advisor, bought up the complications of firm grant deadlines, as well as challenges that “rejected” grant applications pose to the project. Due to these factors, the risk of having to close the project early was too high so that idea was rejected. The project manager eventually chose to create a Business Plan for CMF. It met the requirement of the project being meaningful and had potential to make a positive difference in her work environment. The project was named, “The Copper Mountain Project, a PMP to Build a Business Plan for CMF”.

Further, to mitigate risk, the project manager decided that the product of this project would be a business plan that the CMF board could adopt should they choose. This would eliminate the need for board approval. This was important because a rejected business plan from the board would result in termination of the project. This was fitting because the nature of how the board makes decisions. The project manager would be able to present the plan and they would approve or deny any section of the plan and only use the pieces that they felt were in line with the CMF strategic goals. Their decision to accept or reject the plan would have no bearing on the completion of the project and meeting the course requirements.

While creating the charter, the project manager had to choose a sponsor. The project manager chose Sheri Buretta, a CMF Board Member, to be the representative for the CMF Board. Her influence and passion for the organization made a good fit for the project. She was very excited when the project manager presented the idea and approved the charter via email shortly thereafter. The project manager also presented the idea to her supervisor, the Chairman of the Board for CMF. He also supported the idea. After the project manager received the notice to proceed from her sponsor and lead student advisor, she informed her team member. The project manager explained to the team member that her input for the project would be a great contribution and high appreciated. They reviewed their schedules and mapped out times throughout the semester to discuss what would be needed and helpful in a business plan for CMF.

PLANNING

During the planning portion of this project a detailed Project Management Plan (PMP) was created. The development of the plan was done throughout the 2015 spring semester. This included fleshing out the full scope and complete PMP subsidiary plans including change management plan, metrics management plan, risk management plan, stakeholder management plan, and a schedule management plan.

The most challenging part of this project was understanding the scope of the project and the requirements of the class. Because it was unclear, creating the plan was difficult for the project manager. This would continue to be a challenge throughout the life time of the project. She didn’t understand that both the requirements of the course and the requirements of the product both needed to be included in the plan. This was reflected in the quality of the first draft of the project management plan. The first drafts of the WBS and project schedule were incomplete. The plan only contained the planning for the product of the project and did not include the requirements for the course. Large sections were missing and this was reflected feedback from my advisory committee. One committee member mentioned that they would have liked to see more complete deliverables. Another mentioned that it was a good start but the requirements for the course were missing. Another challenge was working with Microsoft Project. The project manager attempted to alter an online template however, after several hours of trying to alter it with the correct dates and time, she found that it was easier to create a schedule from scratch.

By mid-March the schedule and WBS were in a working format. She chose a chronological WBS format because it was fitting for the time constraint of the project and it matched the flow of the semester-based schedule. Through trial and error, and extra hours written into the schedule to make appropriate fixes, the plan was created and approved by the student advisory committee.

At the start of the 2015 fall semester, a feasibility study was done on the PMP and was significantly updated. The project manager changed the formatting and added several subsidiary plans including risk management, metric management, stakeholder management, and communications management plans.

Other elements of the course requirements included the IRB training and submittal. Since the process of getting IRB approval from the IRB office was new, this posed a serious risk of running behind schedule. The office had not found an efficient and timely way to process applications and the wait time was at least two weeks to receive approval. Further, IRB submissions were not scheduled until the mid-semester, leaving very little time to receive the approval and continue with the project. As a graduate requirement, this threatened the completion of several projects. After several discussions with members of the advisory committee, a streamlined process of getting a preliminary determination was created using email. After several emails between the project manager, the IRB office, and lead student advisor, it was determined that IRB review was not needed for this project.

STAKEHOLDER IDENTIFICATION

A lot of consideration went in to identifying stakeholders. CMF was in the middle of organizational change and some positions were eliminated. Luckily, the changes that were made did not have an adverse effect on the plan. Minimal change was needed to the PMP. The CMF Board Members were the most powerful and influential stakeholders for the project. For that reason, a lot of thought and consideration went into their role in the project. The project manager considered their preferred communication style, and the way the board makes decisions.

The decision making process was really the driving factor in determining what product. The project manager wanted the product to be helpful and customizable. Additionally, she did not want the CMF Board Members to feel that they had to accept the plan. The CMF Board is very involved in the projects that are pursued so progress is slow and calculated. The project manager did not want to produce a product that was too detailed because there was a high risk that the board would reject or change the product. With that said, the product created was high-level. That way, time was not wasted doing detailed work that may have been rejected. To that end, the product was designed to be customizable.

EXECUTION

The execution of the project began at the beginning of the 2015 spring semester. During this phase the PMP was reviewed and updated, and the project was executed. Additionally, research methods, data analysis, and literature review were conducted.

During the creation of the product, the project manager quickly found out where the weaknesses were in the PMP, even after the feasibility study. As mentioned in the planning section, she had a hard time forming the scope of the project and the product. She had received feedback from several student advisory committee members that didn't fully make sense until she started creating the actual product. What the project manager realized was that the PMP actually contained very little guidance on what the stakeholder requirements were. She had listed all of the requirements for the course and minimal requirements for the product. Due to this, it was much harder to determine if the product was meeting stakeholder requirements. For example, one requirement was that the product met all financial and legal reviews. This approval was easily obtained as the information being provided was already public knowledge and the plan did not violate any non-profit laws. Additionally, the last requirement was that it was in line with the CMF mission vision and values. Of course financial sustainability was in line with the mission and vision. The project manager needed more information that was unobtainable due to time constraints. The project manager was familiar enough with the organization that she was able anticipate that the product was very similar to what the board would have like to see in their sustainability plan. In retrospect the following questions would have been asked to further flesh out requirements for the product:

- What is your timeline?
- What is your budget?
- What human resources are available in the department?
- What other human resources are available for the project?
- What is the skill set of the human resources available?
- Is training available to the team?
- What is your idea of a sustainability plan?
- Is this a 3-5 year plan?

- Is this a 5-10 year plan?
- Who will be the sponsor?
- Will the final plan require Board approval?
- What is the threshold for time and budget that the project manager can operate in?

Working through these questions with the CMF Board Members would have created a solid set of requirements and provided a clear idea of what the end product was supposed to be.

MONITORING AND CONTROLLING

Monitoring and controlling took place during the 2015 fall semester. During this phase the change management plan, metrics management plan, stakeholder management plan, and risk management plan were heavily used.

The change management plan was very well written and conducive to making efficient and calculated changes to the project in a timely manner. All changes requested were considered, approved and implemented by the project manager. The change management request form accurately documented the need for the change and what areas of the project would be affected by the change. Once the change request was accepted, it was documented in the change request log and implemented in the project. The need for a more robust change management plan wasn't needed because there was no cost associated with the project, and the sponsor did not want that level of involvement in the project. A total of seven changes were requested, approved, and documented.

The metrics management plan was effective in tracking progress of the project. Thresholds were set appropriately and a report was produced at every PPM delivery due date. During this project a lot of KPI's were tracked. Too many metrics were included in the plan and could have been removed. In retrospect, the metrics management plan would have been directly tied to the knowledge area application.

The risk management plan was extremely helpful in capturing risks that had occurred during the project. The risk register was fairly robust. Seven risks occurred and six of them were accounted for. However, the unanticipated risk that had occurred added a significant delay in the creation of the product. Risk number seven was a resource allocation issue. The project manager was required to attend an event and was giving additional work as a result of attending the event. The result was the additional of 21 days to the delivery date of the product. This was added to the risk register and logged in the risk realization log. The risk realization log was used throughout the project, however the dates, anticipated impact of the risk, and the actual impact of the risk were not tracked. These fields were added to the risk realization log during the middle of the project execution, about half way through the semester.

CLOSEOUT

The close out phase will be completed during the last 4 weeks of the 2015 fall semester. A final report, final product, data analysis, literature review and final presentation will be produced during the project closeout phase. Unfortunately, the PMP for this project did not contain a closeout plan. Fortunately, the course requirements, acceptance criteria, and critical success factors documented in the PMP will provide a solid road map on the closeout procedures of the project.

The project is scheduled to close on December 2, 2015 after the final presentation. The final submission will include the final written report, PowerPoint slides, lessons learned, knowledge area application write up, PMP, project charter, letters from sponsor, and any other relevant information to the project. A final 30 minute presentation about the life of the project will be due on November 30. Finally, the final product will be delivered to the sponsor.

RESEARCH CONCLUSION

LITERATURE REVIEW CONCLUSION

The literature review leads to a clear need for continued support for scholarship and career grants. The literature supported that Alaska Natives have lower graduation rates than any other race in Alaska and compared to the rest of America's reporting states. (Frazier, Wheeler, Spiers, Kirby, & Mielke, 2015) Additionally, Alaska Natives also lag behind the rest of Alaska and the rest of America's reporting states in other economic indicators, such as household income, and percentage of people living below the poverty line. Continuing to offer scholarships and career grants addresses both of the above challenges by easing the financial burden of education and increasing educational opportunities for the shareholders of The Tatitlek Corporation.

DATA ANALYSIS CONCLUSION

The data shows the number of student recipients (Total Awards with No Delay) is steadily increasing from one recipient in 1991, to 34 recipients in 2015. The Shareholder Services Department shared insights about the nature of recipients and available scholarships and career grants. According to the department, applying for scholarship from regional and tribal ANC's has become the norm when shareholders and descendants are seeking higher education. The assumption is that every eligible shareholder and descendant pursuing higher education and professional training applies for a scholarship or career grant. Under that assumption, the graph also represents all shareholders and descendants seeking higher education. Considering this assumption, this implies that the number of shareholders and descendants seeking higher education is increasing.

The number of graduates (Total Graduates) is also increasing, from two graduates in the year 2000, to seven in the year 2015. The number of graduates increased by 2.5 times in 8 years, from two graduates in 2007 to seven graduates in 2015.

Finally, a correlation above 0.70 is considered a strong relationship (Bruce Ratner). The correlation between Total Awards with No Delay and Total Graduates is 0.79. A 0.79 correlation value means that for any value of awards given out (hypothetical or real), the resulting Number of Graduates would be predicted with 79% accuracy or within + or - 21%. The results suggest that there is a relationship between the number of total awards and the number of graduates.

RECOMMENDATION

Considering the background of the project, the literature review and data analysis conclusions, the recommendation is to diversify the CMF financial portfolio to secure funding for financial assistance by creating a financial sustainability plan that includes fundraising activities that are within the capabilities of the shareholder services team.

PRODUCT DEVELOPMENT

The project objective was to provide a Financial Analysis and Sustainability Plan for CMF. The approach to the product was to design a product that was high level and highly customizable, so the CMF board had the opportunity to shape the plan and establish ownership. The resulting document is a blueprint for how CMF will work to ensure the long-term sustainability of the positive effects it is producing for the shareholders and descendants of The Tatitlek Corporation.

The plan elements include an overview of CMF, including the mission, vision and goals, and organizational structure.

Mission

Copper Mountain Foundation is a nonprofit foundation supporting Alutiiq culture, education, career enhancement, and the well-being of Tatitlek shareholders, descendants of shareholders, and the Native Village of Tatitlek community.

Vision and Desired Outcomes

Generations of Tatitlek shareholders and descendants rooted in heritage and supported in our dreams of success.

- We are a self-sustained organization.
- We are shareholders with education & career opportunities of choice.
- We are a recognized resource for Tatitlek native heritage.

A Strengths/Weaknesses/Opportunities/Threats (SWOT) analysis was completed on the organization and the CMF team.

Strengths	<ul style="list-style-type: none"> • Strong board support for growth • Staff & Board provide multiple years of shareholder and descendant knowledge • 501(c)(3) status • Flexible scholarship/education grants policy • Have an impartial grants application process • One CMF board member works as nonprofit fundraiser
Weaknesses	<ul style="list-style-type: none"> • Inexperienced in fundraising • Solely dependent on TTC for operations funds • Need more presence & name recognition • No one person with long history with shareholder & descendent knowledge • Limited cross-training and policies & procedures • Limited meetings and dialogue with board • Little public (clients & donors) awareness of Copper Mountain Foundation • Lack of staff • Outdated policies and procedures
Opportunities	<ul style="list-style-type: none"> • Nonprofit status gives more opportunities for grant funding • Educate our shareholders and descendants • Eligible for Pick. Click. Give. and Alaska gaming permit • Partnerships with schools & Universities
Threats	<ul style="list-style-type: none"> • Reduction in Federal grant funding will limit the amount of funds CMF can use to support programs • Serving limited demographic that will limit funding opportunity • Lack of planning for the future • Loss of cultural knowledge by the passing of Tatitlek Elders • Increasing costs for education limits impact of grants/scholarships • Weaker Alaska Native Corp. economy means more competition for fewer donations

A study of the demographics of the shareholders was conducted by analyzing the location and ages of the shareholders.

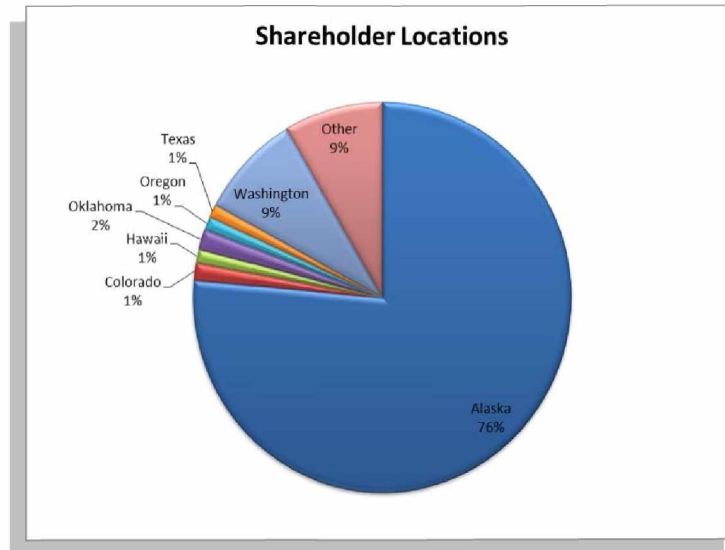


Exhibit No. 12: Shareholder Locations U.S.

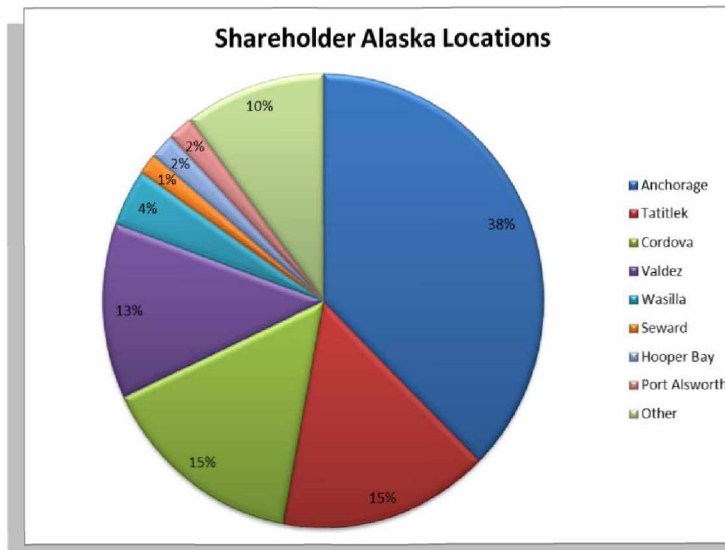


Exhibit No. 13: Shareholder Locations Alaska

The results of the shareholder location analysis indicated that 76% of the shareholders reside in Alaska. The second largest shareholder population was in Washington State with 9% of shareholders. Within Alaska, 38% of the shareholders were located in Anchorage. The second largest shareholder population was in Tatitlek, Valdez, and Cordova with approximately 15% of shareholders living in each community.

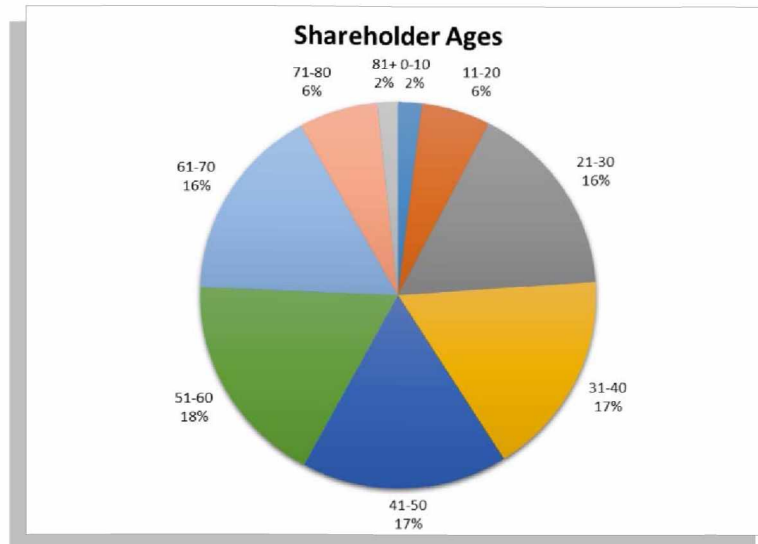


Exhibit No. 14: Shareholder Ages

The results of the shareholder age analysis indicated that the largest shareholder age group was 20-60 years, with 68% of the shareholders in this group. The 11-20 year olds accounted for 6%, and 60-81 year olds accounted for 8% of the shareholder population.

Current services were listed, and the roles and responsibilities of the team were included. CMF currently provides funding and management support for the following programs:

- Academic scholarships
- Career grants
- Youth grants
- Burial assistance
- Funding and project coordination for:
 - Peksulineq – Tatitlek Cultural Heritage Week
 - Tatitlek Church Renovation Project

The following chart is the current organizational chart of the Copper Mountain Foundation. The roles and responsibilities were further defined in the plan along with envisioned roles and responsibilities.

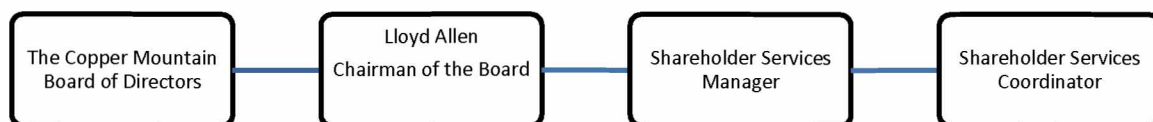


Exhibit No. 15: CMF Org Chart

A financial analysis was conducted including the current financial standing and budget for operating expenses. The analysis of the budget was as follows:

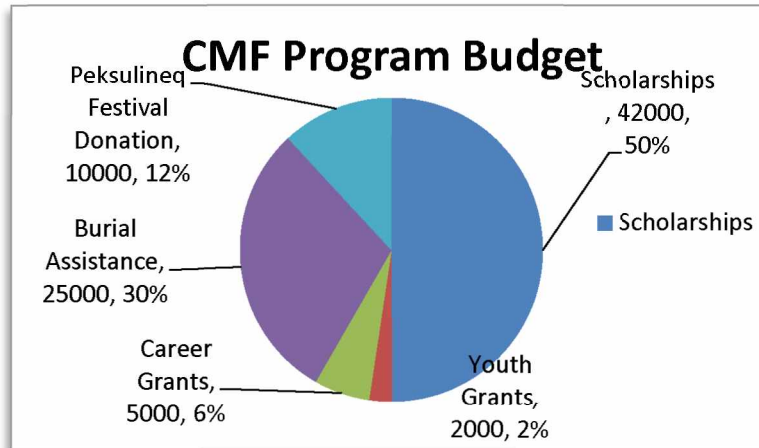


Exhibit No. 16: CMF Program Budget

Five year goals were included from a strategic planning session with intermediate targets to meet.

5 year goals

- By 2016, develop policies, procedures, and cross-training to maximize asset and resource usage.
- By 2017, retain leadership and support talent to include full-time, contracted, and volunteer.
- By 2018, build foundation's name recognition and positive presence (in and outside of Alaska).
- By 2019, raise 30% of foundation's operating costs through fundraising and grants (state, federal, nonprofit).

Intermediate Targets

- By 2017, hire contract fund raiser/grant writer.
- Each year, develop 1-2 strategic partnerships.
- By 2016, apply for Alaska Gaming permit.
- By December, 2017, increase fundraising by 5% and grant funding by 6.5%.

Finally, a list of funding raising activities was listed that could be completed within the shareholder services department and the provided budget. The start of all of the activities could be completed within 2016 fiscal year. Activities included:

- Create Board Solicitations
- Establish an Alumni Association
- Ramp up the Pick Click Give Campaign
- Apply for a Gaming License

PROJECT CONCLUSION

The following critical success factors listed in the project management plan were met.

- Project was on schedule. All milestones on the critical path were met within tolerances.
- Project Deliverables were approved by Student Advisory Committee and Sponsor.
- Data Collection and analysis is completed by PM 686B PPM#3.
- All stakeholder requirements were met. See Section 9.1 for complete Stakeholder Requirements.
- Timely Communication with Student Advisory Committee and Sponsor.

The following acceptance criteria listed in the project management plan were met.

A deliverable will be accepted by the Sponsor if it meets the following criteria:

- All stakeholder requirements have been met or completed and accounted for in the WBS and Project Schedule.
- Financial Analysis and Sustainability Plan is in alignment with CMF Mission, Vision and Values.
- Financial Analysis and Sustainability Plan passed legal and financial reviews.

The project will be accepted by the Student Advisory Committee if meets the following criteria:

- PPM Deliverables have been submitted and scored with a 75% or higher.
- Courses PM 686A and PM 686B received a final grade of 'B' or higher.

The project is on scheduled to be completed on time. This project is considered to be a success.

FURTHER RESEARCH

There are other reasons why Alaska Native students are dropping out of high school and college that need to be explored other than financial needs. The college environment is much different than high school in rural and urban communities. In college there is very limited adult supervision. Students are responsible for their own homework, chores, and jobs. Drugs and alcohol may be more prevalent in college making it harder to avoid peer pressure. The administration, enrollment, and registrar systems in universities may also be intimidating to navigate. And lastly, the academic expectations are different in high school than in college. These additional factors need to be explored to get a more clear idea of why Alaska Natives and Tatitlek shareholder and descendants are leaving college. I suggest developing a survey for all scholarship recipients to fill out if they drop out or if they graduate asking what contributed to their setback or success, and how CMF can help or did help them succeed.

Additionally, the world of non-profit fundraising is endless. The foundation can use this opportunity to train shareholder employees in non-profit management, creating highly trained shareholder employees. Further, as the financial portfolio becomes stronger, current programs would be expanded, and new programs could be created. I suggest a priority list be created to allocate those funds as they become available. Other successful programs such as Voyage to Excellence (VTE) and Alaska Native Science and Engineering Program (ANSEP) can be observed to get ideas on how to expand future programs.

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Financial Analysis and Sustainability Plan

For the Copper Mountain Foundation, a 501c (3)

Prepared by: Angela Totemoff

Prepared for: Copper Mountain Foundation Board Members

The Tatitlek Corporation

September 30, 2015

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INTRODUCTION

Purpose of this Plan

This document is a blueprint for how the Copper Mountain Foundation will work to ensure the long-term sustainability of the positive effects it is producing for the shareholders and descendants of The Tatitlek Corporation.

One of the goals of The Tatitlek Corporation is to provide opportunities for enriching careers for both our shareholders and employees. Copper Mountain Foundation has become a successful vehicle to provide those opportunities through providing scholarships, career grants, and burial assistance to our shareholders and descendants of shareholders.

Since 2008, Copper Mountain Foundation has provided on average, 28 scholarships and career grants. In 2014, five families received burial assistance. Without assistance from the Copper Mountain Foundation, these families would have received less financial assistance for these expenses and may have experienced financial hardships. This would be in direct opposition to The Tatitlek Corporation's goal of enriching careers for its shareholders and descendants.

Further, increasing financial diversification is important because it minimizes the impact that any one financial source may have on the organization. Copper Mountain Foundation currently receives 100 percent of its operation expenses from The Tatitlek Corporation and is in need of other sources of revenue.

This plan will provide a financial analysis and ideas that the Copper Mountain Foundation may incorporate to increase financial sustainability. Elements of the strategic planning session done in 2014 with Leigh McGee at OSIYO are incorporated into this plan.

What is "Sustainability"?

The term "sustainability" is defined as ensuring the continuation of financial assistance to shareholders and descendants of The Tatitlek Corporation for scholarships, career grants, burial assistance, and cultural preservation events.

THE COPPER MOUNTAIN FOUNDATION

Mission

Copper Mountain Foundation is a nonprofit foundation supporting Alutiiq culture, education, career enhancement, and the well-being of Tatitlek shareholders, descendants of shareholders, and the Native Village of Tatitlek community.

Vision and Desired Outcomes.

Generations of Tatitlek shareholders and descendants rooted in heritage and supported in our dreams of success.

- We are a self-sustained organization.
- We are shareholders with education & career opportunities of choice.
- We are a recognized resource for Tatitlek native heritage.

SWOT Analysis

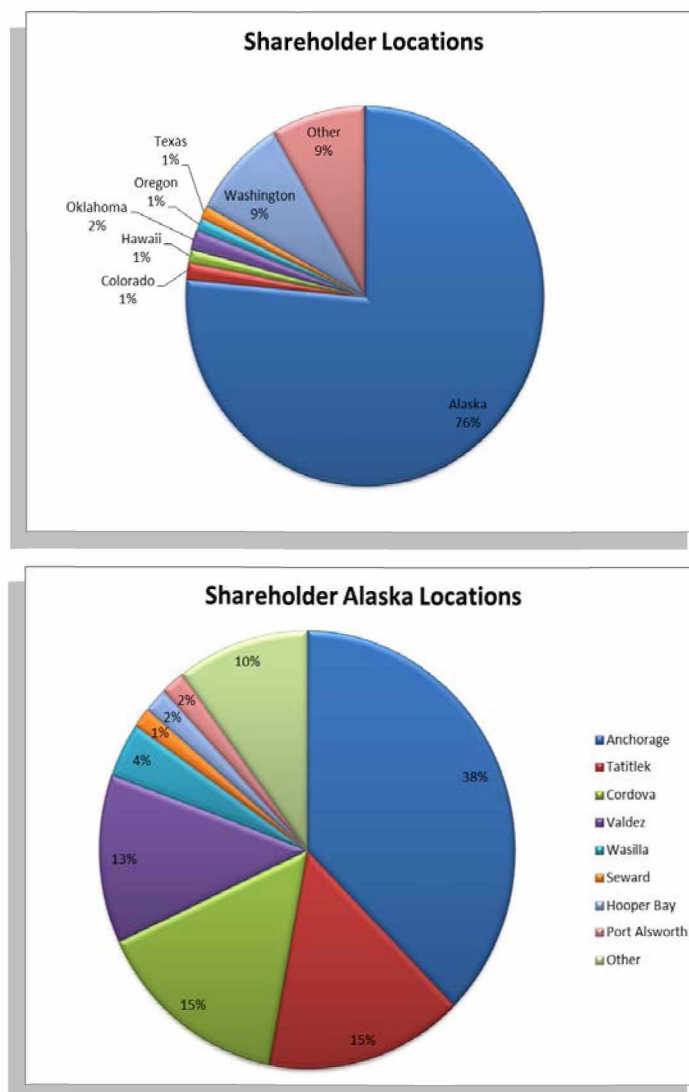
Strengths	<ul style="list-style-type: none">• Strong board support for growth• Staff & Board provide multiple years of shareholder and descendant knowledge• 501(c)(3) status• Flexible scholarship/education grants policy• Have an impartial grants application process• One CMF board member works as nonprofit fundraiser
Weaknesses	<ul style="list-style-type: none">• Inexperienced in fundraising• Solely dependent on TTC for operations funds• Need more presence & name recognition• No one person with long history with shareholder & descendent knowledge• Limited cross-training and policies & procedures• Limited meetings and dialogue with board• Little public (clients & donors) awareness of Copper Mountain Foundation• Lack of staff• Outdated policies and procedures
Opportunities	<ul style="list-style-type: none">• Nonprofit status gives more opportunities for grant funding• Educate our shareholders and descendants• Eligible for Pick. Click. Give. and Alaska gaming permit• Partnerships with schools & Universities
Threats	<ul style="list-style-type: none">• Reduction in Federal grant funding will limit the amount of funds CMF can use to support programs• Serving limited demographic that will limit funding opportunity• Lack of planning for the future• Loss of cultural knowledge by the passing of Tatitlek Elders• Increasing costs for education limits impact of grants/scholarships• Weaker Alaska Native Corp. economy means more competition for fewer donations

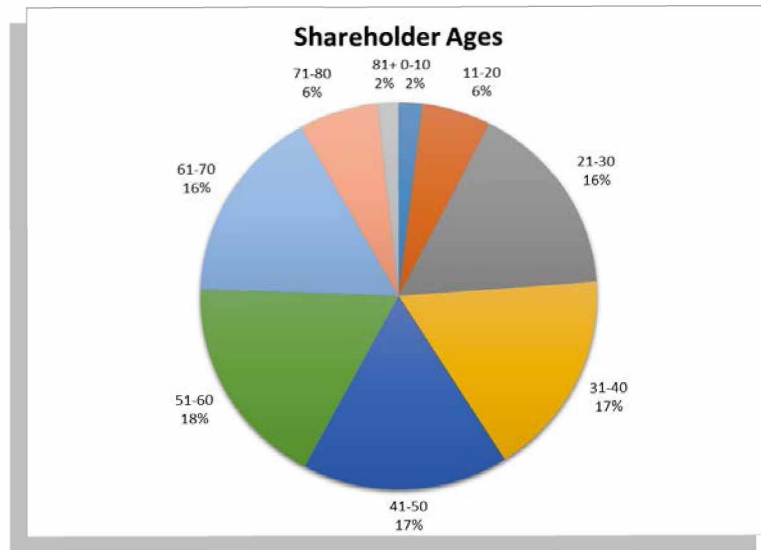
Shareholder and Descendant Demographics

It is important to understand the demographics of the people you are serving to better understand how to tailor services and programs so that they are available to as many of our shareholders and descendants as possible. To this end, shareholder ages and locations were collected. The following graphs were created using shareholder data from August 2015.

The data shows 76% of the shareholders reside in Alaska. The second largest shareholder population is in Washington State with 9% of shareholders. Within Alaska, 38% of the shareholders are located in Anchorage. The second largest shareholder population is in Tatitlek, Valdez, and Cordova with approximately 15% of shareholders living in each community.

The largest shareholder age group is 20-60 years, with 68% of the shareholders in this group. The 11-20 year olds accounted for 6%, and 60-81 year olds accounted for 8% of the shareholder population.





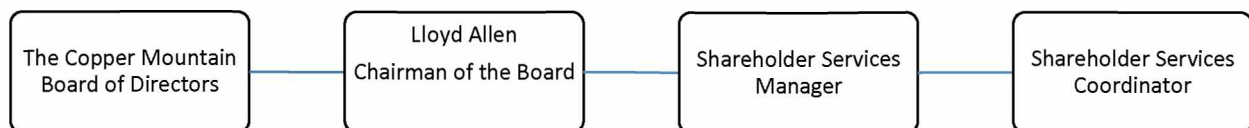
Current Programs and Services

The following are current programs offered by the Copper Mountain Foundation that are available to The Tatitlek Corporation Shareholders and Descendants.

- Academic scholarships
- Career grants
- Youth grants
- Burial assistance
- Funding and project coordination for:
 - Peksulineq – Tatitlek Cultural Heritage Week
 - Tatitlek Church Renovation Project

Current Organizational Chart

The following chart is the current organizational chart of the Copper Mountain Foundation



Current Roles and Responsibilities

The roles and responsibilities were defined in a memo provided by the Chairman of the Board. They are as follows:

The Copper Mountain Board of Directors

- Provides oversight and direction of programs and services for the Copper Mountain Foundation.

Chairman of the Board, Lloyd Allen

- Manage, review and approve all action taken under CMF, including review and approval of all budgets and associated expenditures.

Shareholder Services Team, Angela Totemoff and Michelle Pryor

- Receive, verify and process application for scholarships, youth and career grants for submittal for approval; receive, verify and process burial assistance requests, assume the responsibility of special project as directed by the board, annual budget creation, manage cultural event budgets, and creating board reports.

CURRENT FINANCIAL STANDING

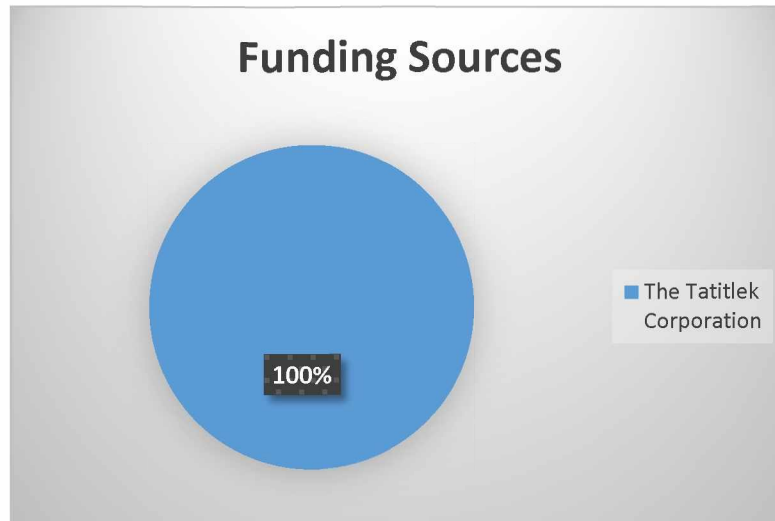
2013 – 2014 Financial Position

COPPER MOUNTAIN FOUNDATION		
Statement of Financial Position		
December 31, 2014 and 2013		
Assets		
	2014	2013
Current Assets:		
Cash and Cash Equivalents	\$ 4,250	\$ 12,101
Accounts Receivable - From Corporate	32,537	32,500
Total Assets	<u>\$ 36,787</u>	<u>\$ 44,601</u>
Liabilities and Net Assets		
Current Liabilities:		
Accounts Payable	\$ -	\$ 1,077
Total Liabilities	-	1,077
Net Assets:		
Unrestricted Net Assets	(13,596)	4,983
Temporarily Restricted Net Assets	50,383	38,541
Total Net Assets	<u>36,787</u>	<u>43,524</u>
Total	<u>\$ 36,787</u>	<u>\$ 44,601</u>

TTC funds CMF quarterly, based on the budgeted amount set the prior year. If the budget is anticipated to go over, accounting will notify Shareholder Services and another donation is made from the Shareholder Services Department to make up the difference. CMF has not gone over budget.

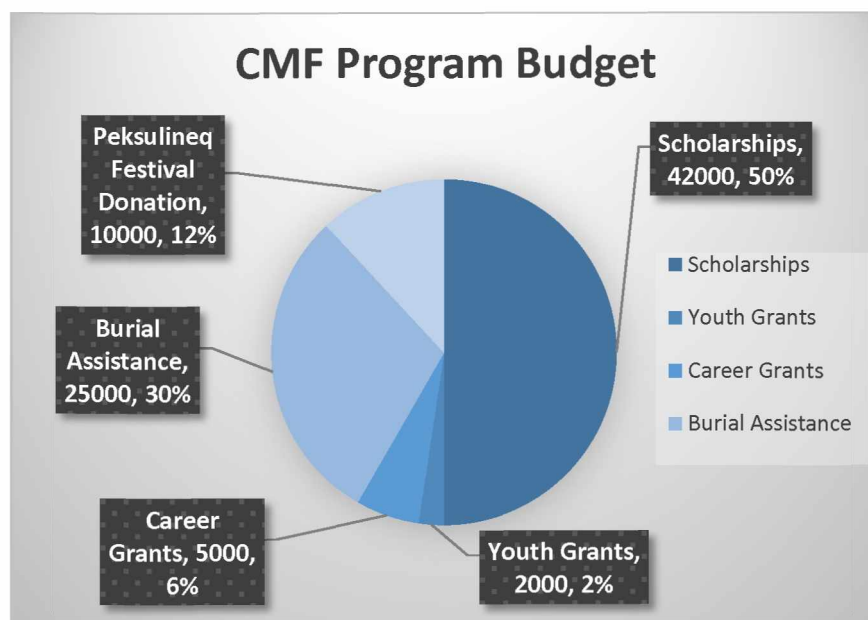
Current Funding Sources

CMF receives 100% of budget requirements from TTC. The total funds needed to convert the costs of the programs for 2014 was \$118,000.



2015 Budget

The following is the list of expenses that was approved in the 2015 budget in November, 2014. The Tatitlek Cultural Heritage Week expenses are not included in the budget. Funds raised for this event are strictly for the event and cannot be applied to any other program within CMF.



A SELF-SUSTAINED ORGANIZATION

The strategies to be used to accomplish these goals include utilizing the expertise, teamwork, and collaboration of the shareholder services team. We will build upon these goals on a firm establishment of policies and procedures, and organizational goals. As the organization gains more financial stability, we plan to acquire additional employees to address more aggressive goals in the vision and desired outcomes.

Sustainability Goals

In February, 2014, the Chairman of the Board, Shareholder Services Manager, Shareholder Services Coordinator, and CHW Project Coordinator met with Leigh McGee, a consult with OSIYO and devised a list of goals for CMF. The following 5 year goals were formulated during the session.

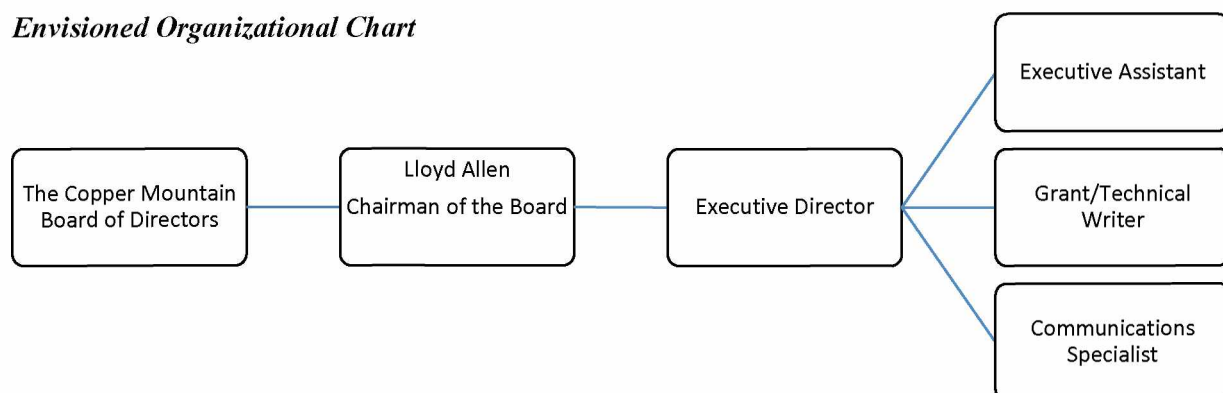
5 year goals

- By 2016, develop policies, procedures, and cross-training to maximize asset and resource usage.
- By 2017, retain leadership and support talent to include full-time, contracted, and volunteer.
- By 2018, build foundation's name recognition and positive presence (in and outside of Alaska).
- By 2019, raise 30% of foundation's operating costs through fundraising and grants (state, federal, nonprofit).

Intermediate Targets

- By 2017, hire contract fund raiser/grant writer.
- Each year, develop 1-2 strategic partnerships.
- By 2016, apply for Alaska Gaming permit.
- By December, 2017, increase fundraising by 5% and grant funding by 6.5%.

Envisioned Organizational Chart



Envisioned Roles and Responsibilities

The Copper Mountain Board of Directors

- Provides oversight and direction of programs and services for the Copper Mountain Foundation.
- Supply names and contact information for potential contributors
- Cultivates and asks for donations to events and fundraisers
- Volunteers for events
- Opens doors to businesses and foundations

Chairman of the Board

- Manage, review and approve all action taken under CMF, including review and approval of all budgets and associated expenditures.

Executive Director and Staff

- Receive, verify and process application for scholarships, youth and career grants for submittal for approval
- Receive, verify and process burial assistance requests, assume the responsibility of special project as directed by the board
- Annual budget creation
- Manage cultural event budgets
- Creating quarterly board reports
- Manage timelines
- Research grant opportunities
- Create and submit grant proposals

TURNING PLANS INTO ACTION

The preceding sections provide a comprehensive blueprint for sustaining positive community results. It's important to note that the following elements are a starting point of future plans if the board approves the team to proceed. Each fundraising plan will need further planning. This final section describes how the organization will implement the sustainability plan and make ongoing revisions to the sustainability plan as needed so that it remains a meaningful blueprint for many years to come.

Board Solicitation

Plan and Rationale	Our board has never been asked to donate to CMF. Ask that every board member give to the best of their ability.		
Strategy	President to encourage board members to donate at the beginning of very year. Make donation process as efficient as possible.		
Staff Time	Executive Director	1 day	
	Staff	1 day	
Board Time	Board Members	1 hr.	
Direct Cost	Minimal		
Schedule	Board solicitation is to be completed within the month of January		
Projected Income	2016	2017	2018
	1000	1250	1500

Membership/Alumni

Plan and Rationale	Membership programs may have many practical benefits, but the biggest benefit to an organization is their potential to increase donor loyalty. Someone who sees themselves as a member of an organization will generally feel more ownership and involvement in an organization than someone who sees themselves just as a donor, even if the member never has any more concrete involvement than simply giving money. Research must be done to ensure that this is within the bylaws of CMF, what benefits we can offer, how we are going to handle membership fees (initiation, expirations), and the roles members play within the organization.		
Strategy			
Staff Time	Executive Director	20 days	
	Staff	30 days	
Board Time	1 days to review		
Direct Cost	labor		
Schedule	Research to start after Staff gets NTP from board members		
Projected Income	2016	2017	2018
	400	500	1000

Pick Click Give

Plan and Rationale	Encourage individual donations for tax write offs Create brand/logo and marketing material. Increase online presents on social media and websites.		
Strategy			
Staff Time	Executive Director	10 days	
	Staff	20 days	
Board Time	minimal		

Direct Cost	\$250 application fee		
Schedule	Application is due in February. PCG Campaign to start in September before PFDs		
Projected Income	2016	2017	2018
	400	500	1000

Raffle/Grand Prize

Plan and Rationale	Hold a raffle. \$50 per ticket. 250 tickets. \$5000 prize		
Strategy	Apply for a gaming license. Sell tickets online. Market on social media, informational meetings, and on website.		
Staff Time	Executive Director 90 days		
	Staff 120 days		
Board Time	Minimal		
Direct Cost	Gaming license fee + tickets		
Schedule	Campaign during the summer months. Announce winners at The Tatitlek Corporation Annual Meeting		
Projected Income	2016	2017	2018
	7500	15000	15000
Total Projected Income	2016	2017	2018
	9300	17250	18500

Conclusion

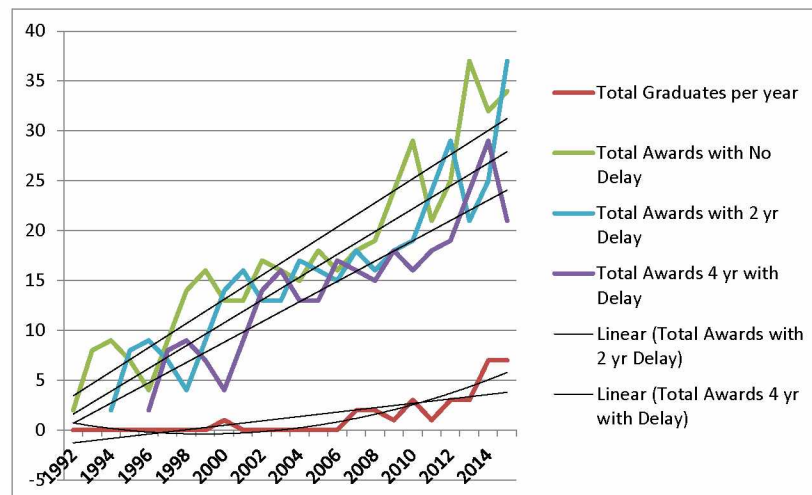
The Copper Mountain has a lot of potential for organizational growth and development. With energetic and efficient staff and devoted board members, CMF can make large strides in achieving financial sustainability through increased philanthropic support, and increased communication and online presence.

Next Steps:

- Schedule a board and staff planning session
- Schedule board meeting to review and approve fund raising plans
- Develop Project Management Plans for Fund raising projects

YEAR	Total Graduates per year	Total Awards with No Delay	Total Awards with 2 yr Delay	Total Awards 4 yr with Delay	Total Yearly Scholarships Paid
1992	0	2			
1993	0	8			
1994	0	9	2		
1995	0	7	8		
1996	0	4	9	2	
1997	0	9	7	8	
1998	0	14	4	9	
1999	0	16	9	7	
2000	1	13	14	4	
2001	0	13	16	9	
2002	0	17	13	14	
2003	0	16	13	16	
2004	0	15	17	13	
2005	0	18	16	13	
2006	0	16	15	17	
2007	2	18	18	16	
2008	2	19	16	15	19,540.00
2009	1	24	18	18	29,000.00
2010	3	29	19	16	12,666.00
2011	1	21	24	18	13,250.00
2012	3	25	29	19	24,917.00
2013	3	37	21	24	32,410.00
2014	7	32	25	29	35,943.00
2015	7	34	37	21	22,316.00

Correlation Coefficients	Value
Average Number of awards	27.625
Correlation with No Delay	0.793526261
Correlation with 2 year delay	0.787510038
Correlation with 4 year Delay	0.716468805





The Copper Mountain Project

A FINANCIAL ANALYSIS AND SUSTAINABILITY PLAN FOR THE COPPER MOUNTAIN FOUNDATION, A 501(C)3

ANGELA TOTEMOFF
PM 686B 2015 FALL

PROFESSORS: LUANN PICCARD, ROGER HULL, SEONG DAE KIM

Agenda

- Project Overview
 - Village of Tatitlek
 - Business Case
 - Background
 - Village of Tatitlek
 - ANCSA
 - Chugach Region
 - The Tatitlek Corporation
 - Copper Mountain Foundation
 - Knowledge Area Implementation
 - Change Management
 - Risk Realization Report
- Research Methodology
 - Literature Review
 - Data Analysis
 - Recommendation /Conclusions
 - Further Research
 - Product Development
 - Acceptance Criteria/CSF
 - Next Steps
 - Lessons Learned

Project Manager Introduction

Angela Totemoff
Shareholder Services
Manager
The Tatitlek Corporation

Worked in Alaska Native
Corporations since 2002

Background in IT, Database
Management, Risk
Management, Contracts
Administration, and
Shareholder Services.



Project Scope

To plan, execute, and monitor the creation a Financial Analysis and Sustainability Plan for the Copper Mountain Foundation that includes current organization financial analysis and a financial development plan, while incorporating the UAA MSPM 686A and B course requirements and deadlines. Final deliverables are a Project Management Plan, a Financial Analysis and Sustainability Plan, a final presentation, and a 20 project report. The project will start on January 16, 2015, and will end on December 15, 2015.

Project Objectives

- Provide guidance on possible revenue making endeavors to support the scholarship and career grant programs
- Increase understanding of the organization's financial standing, programs, and services
- Provide a goal for on-going financial growth and sustainability

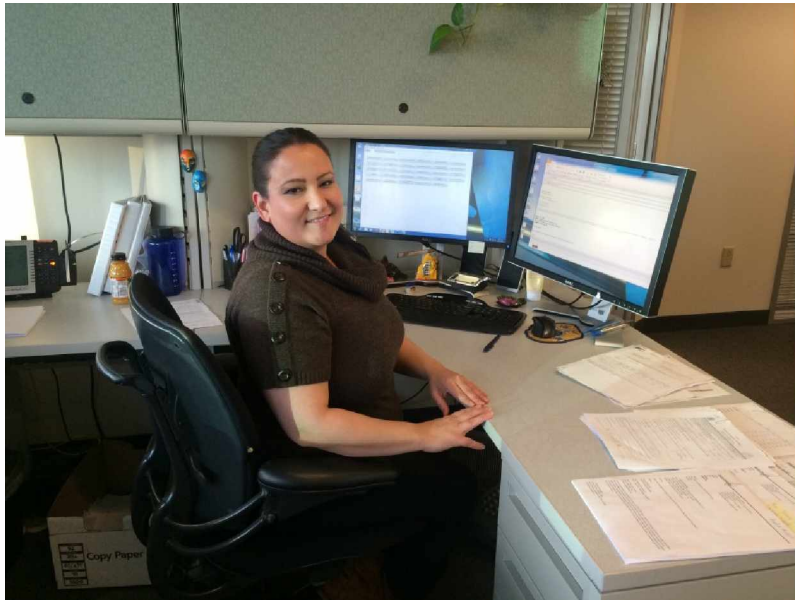
Project Deliverables



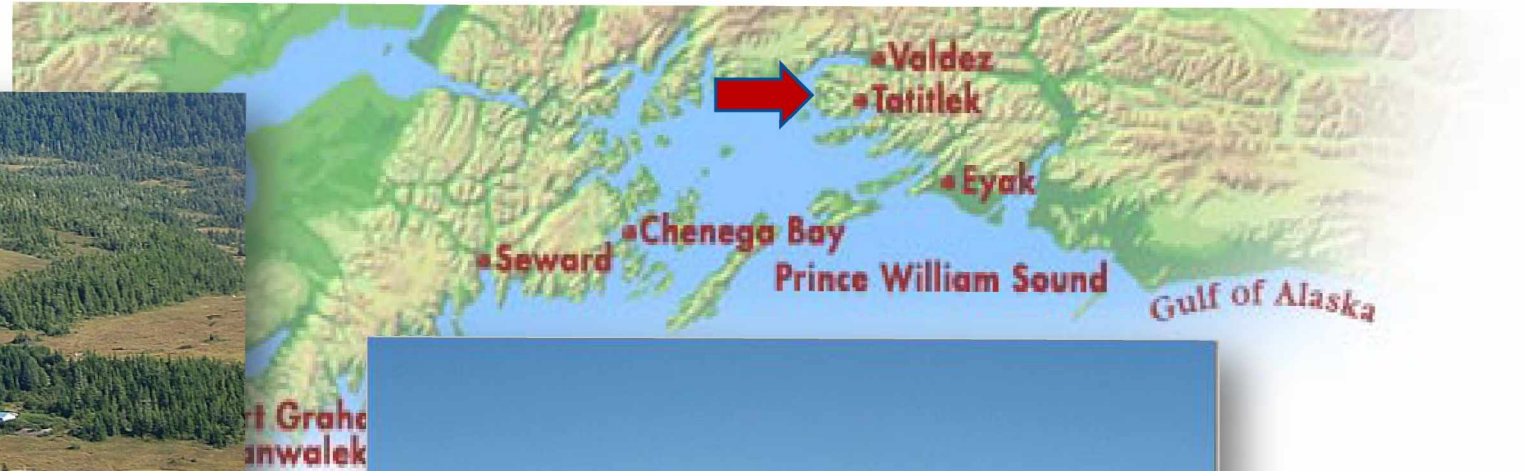
Business Case

Mission Statement of The Tatitlek Corporation

... “we strive to bridge the traditions of our village with global economic opportunity enhancing the quality of life for our shareholders.”



The Native Village of Tatitlek



The People



ANCSA

On December 18, 1971, the "Alaska Native Claims Settlement Act," was signed into law by President Nixon

Alaska Natives traded aboriginal rights to land

40 million acres divided among 220 Native villages and 12 Regional Corporations established

The twelve Regional Corporations were to share in a payment of \$462,500,000 (to be made over an eleven-year period from funds in the U.S. Treasury), and an additional \$500 million in mineral revenues deriving from specified Alaska lands. (Jones, 1981)



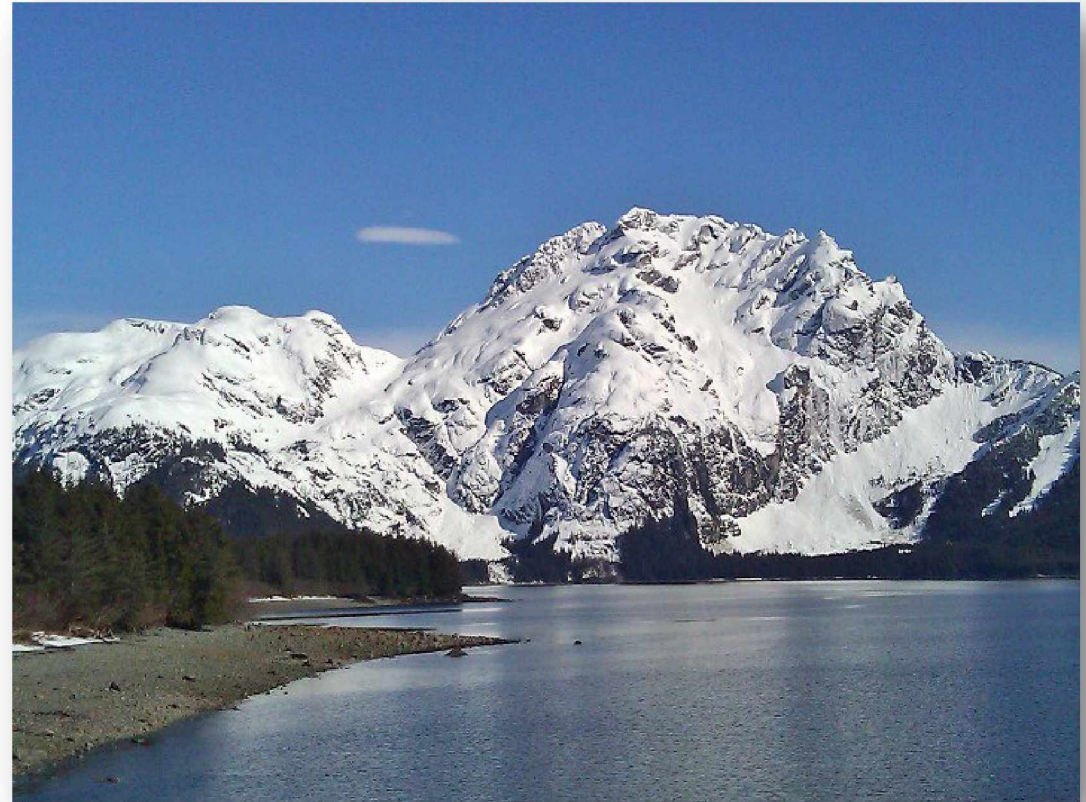
The Tatitlek Corporation

- Opened in 1973
- Headquarters are located in Anchorage, AK
- Offer services and products in satellite imagery, GIS, installation support, IT, range services, virtual training, and construction in private and public sector
- 66 employees in Alaska
- 1046 employees worldwide
- 357 shareholders and 120 registered descendants.



The Copper Mountain Foundation (CMF)

- 501 (c)3, funded and established by The Tatitlek Corporation
- Five CMF Board of Directors
- Three programs focused on financial assistance for the Shareholders of The Tatitlek Corporation,
 - Education and career enhancements
 - Cultural activities
 - End of life expenses

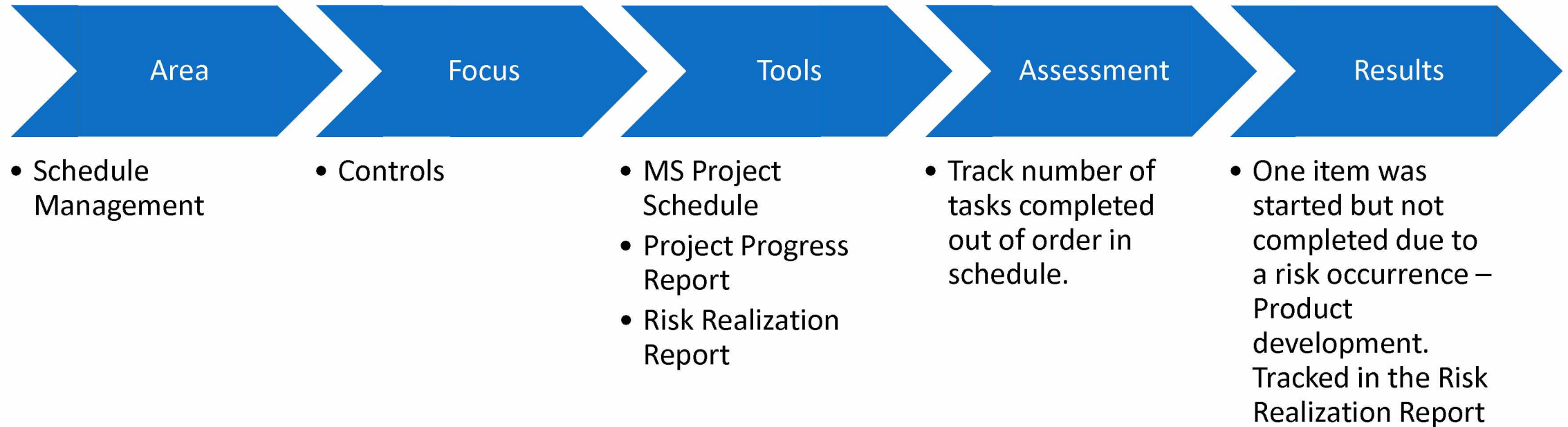


Knowledge Areas

- Schedule Management
- Scope Management
- Stakeholder Management

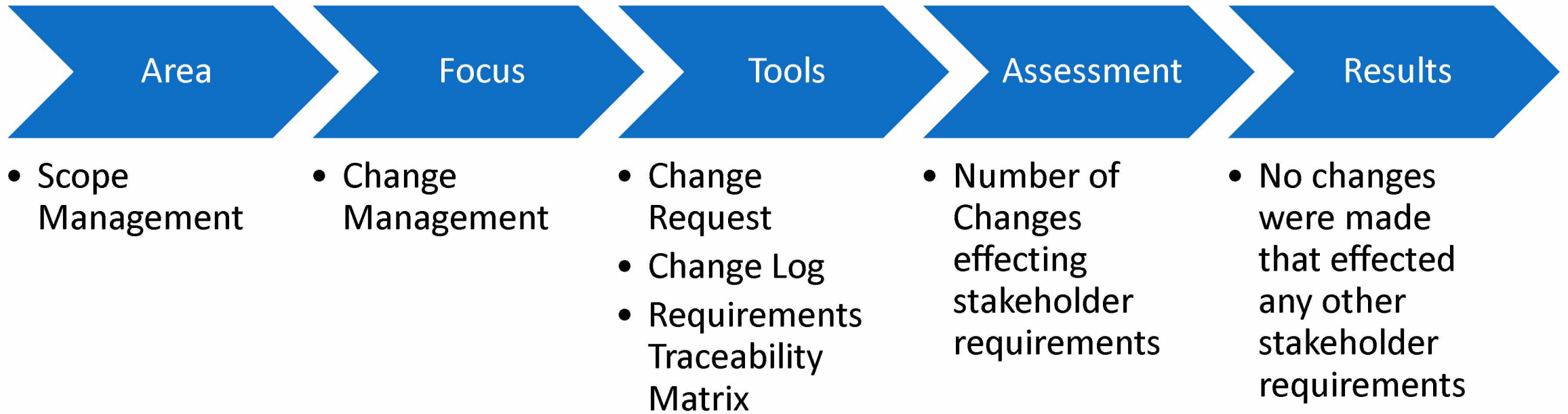


Schedule Management



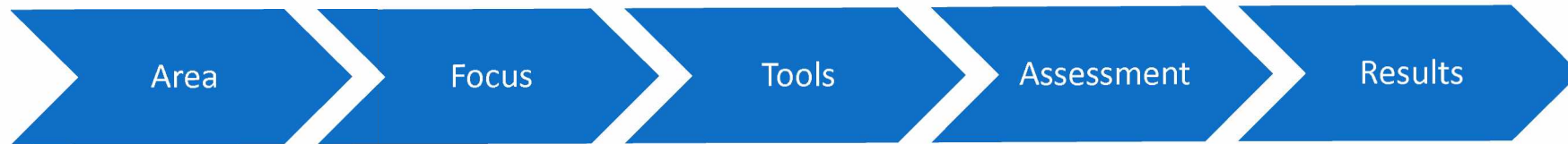
Lesson Learned: Tracking the schedule made the project plan come to life and made the PMP a true LIVE document and powerful tool.

Scope Management



Lesson Learned: Checking and double checking Stakeholder Requirements when changes came up, made me really consider the scope and every individual stakeholder.

Stakeholder Management



• Stakeholder Management

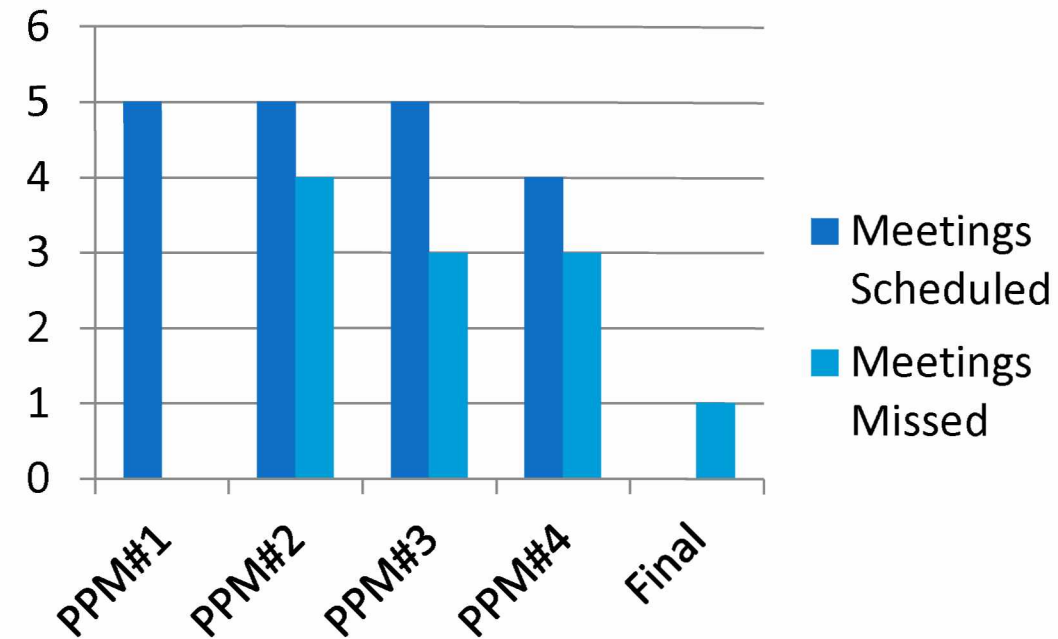
• Communication

- Expectation Contract
- Stakeholder identification
- Stakeholder Communication Preference Sheet
- Communication Matrix

- Track number of missed scheduled meetings with key stakeholders

Lesson Learned: Focusing on communication and tracking meeting schedules helped me focus on meeting agendas and issues that needed to be addressed. Missed meetings were missed opportunities to gain valuable input to project .

Note: PPM#1 – Late meeting



Change Management

CHANGE LOG

Project Title: The Copper Mountain Project

Date Prepared: 1/28/2015



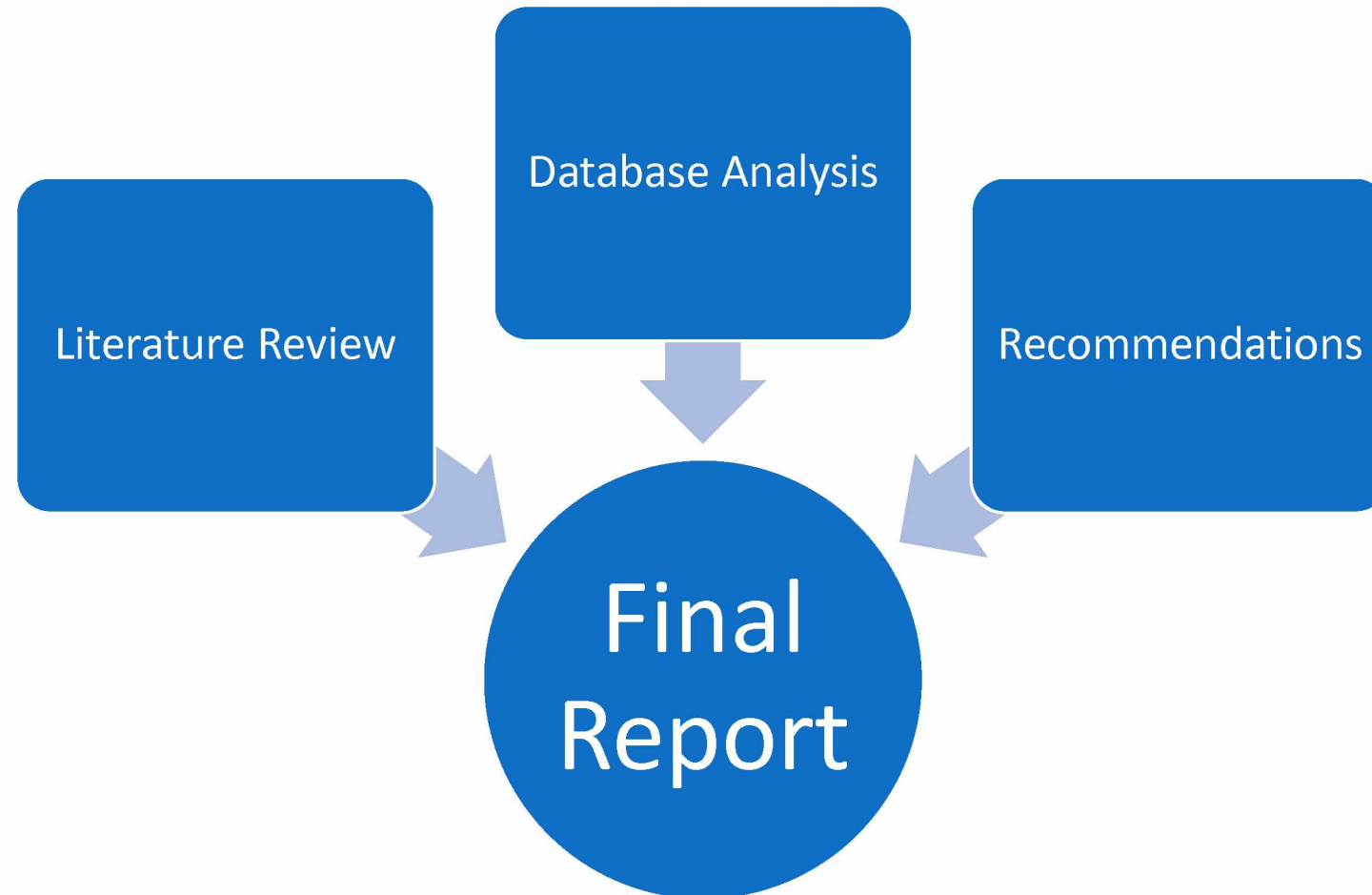
Change ID	Category	Description of Change	Submitted by	Submission Date	Status	Disposition
001	Scope	Project was changed from Grant submission for Tatitlek IRA and NPR to Business Plan for Copper Mountain Foundation.	Angela Totemoff (PM)	1/28/2015	Approved	Complete
002	Scope	Market Analysis and Marketing Plan were removed from Business Plan (product) Requirements	Angela Totemoff (PM)	3/5/2015	Approved	Complete
003	Quality	Project Name Change	Angela Totemoff (PM)	3/16/2015	Approved	Complete
004	Quality	Updated PMP	Angela Totemoff (PM)	9/15/2015	Approved	Complete
005	Quality	Updated PMP, Added sub plans: Risk, Scope, Communications and Stakeholder	Angela Totemoff (PM)	9/17/2015	Approved	Complete
006	Quality	Removed Abstract and Research Sources and Methods from PMP	Angela Totemoff	10/9/2015	Approved	Complete

Risk Management

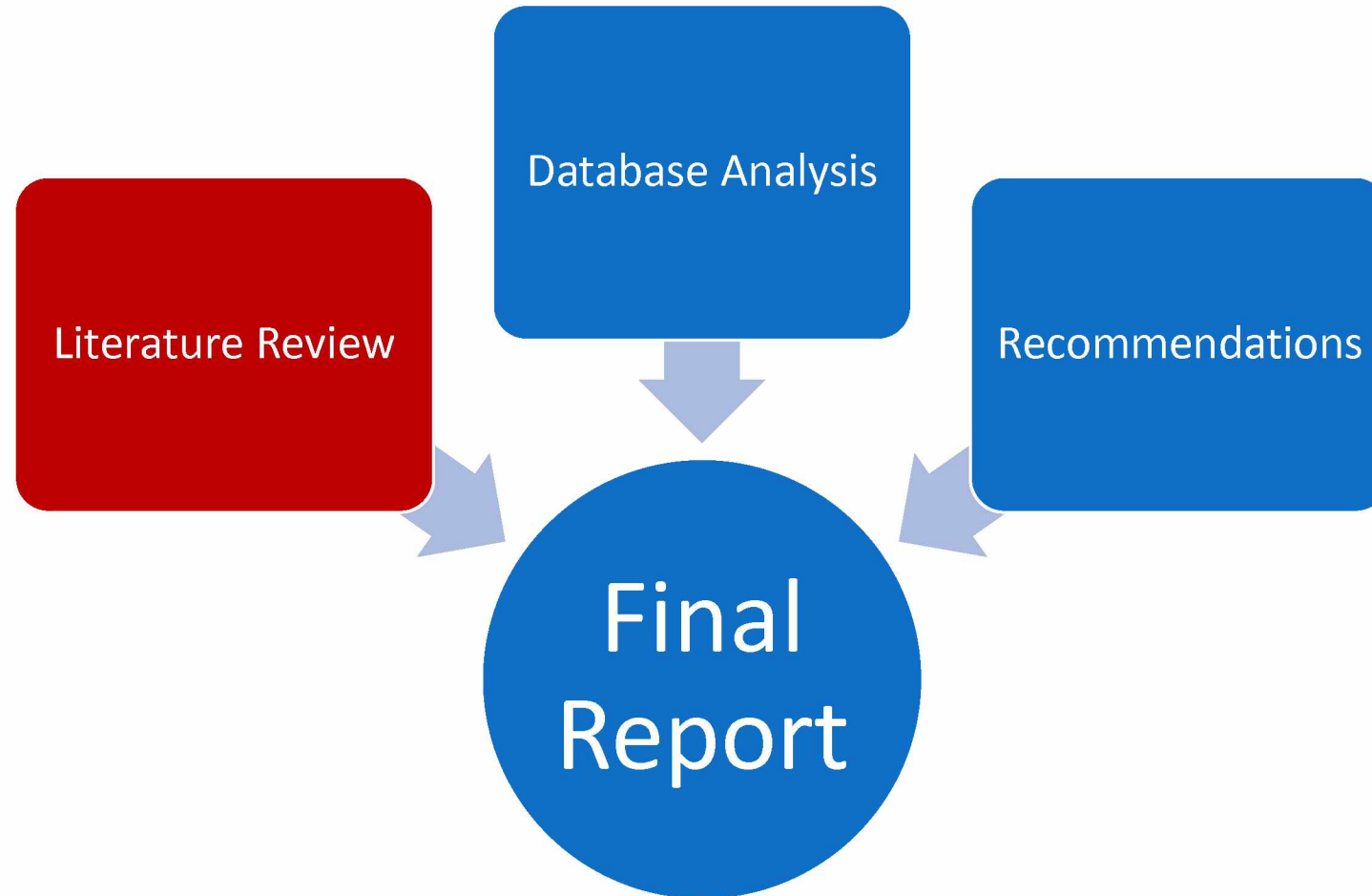
- 8 Risk Responses
- 6 anticipated with built in risk responses and time buffers
- 2 unanticipated risk occurrences:

Date	ID	Risk	Anticipated Impact	Actual Impact	Trigger	Risk Mitigation	Risk Response
11/9/2015		Delay in Product delivery	0	20 days	Unscheduled events	Add large buffer for large deliverables	Schedule Crashing
11/20/2015		Submission of wrong version of final report		3 hrs	Compiling work from two different work stations	Utilize Google Docs or Blackboard Collaboration Area for Version Control	Rework. Document Retrieval

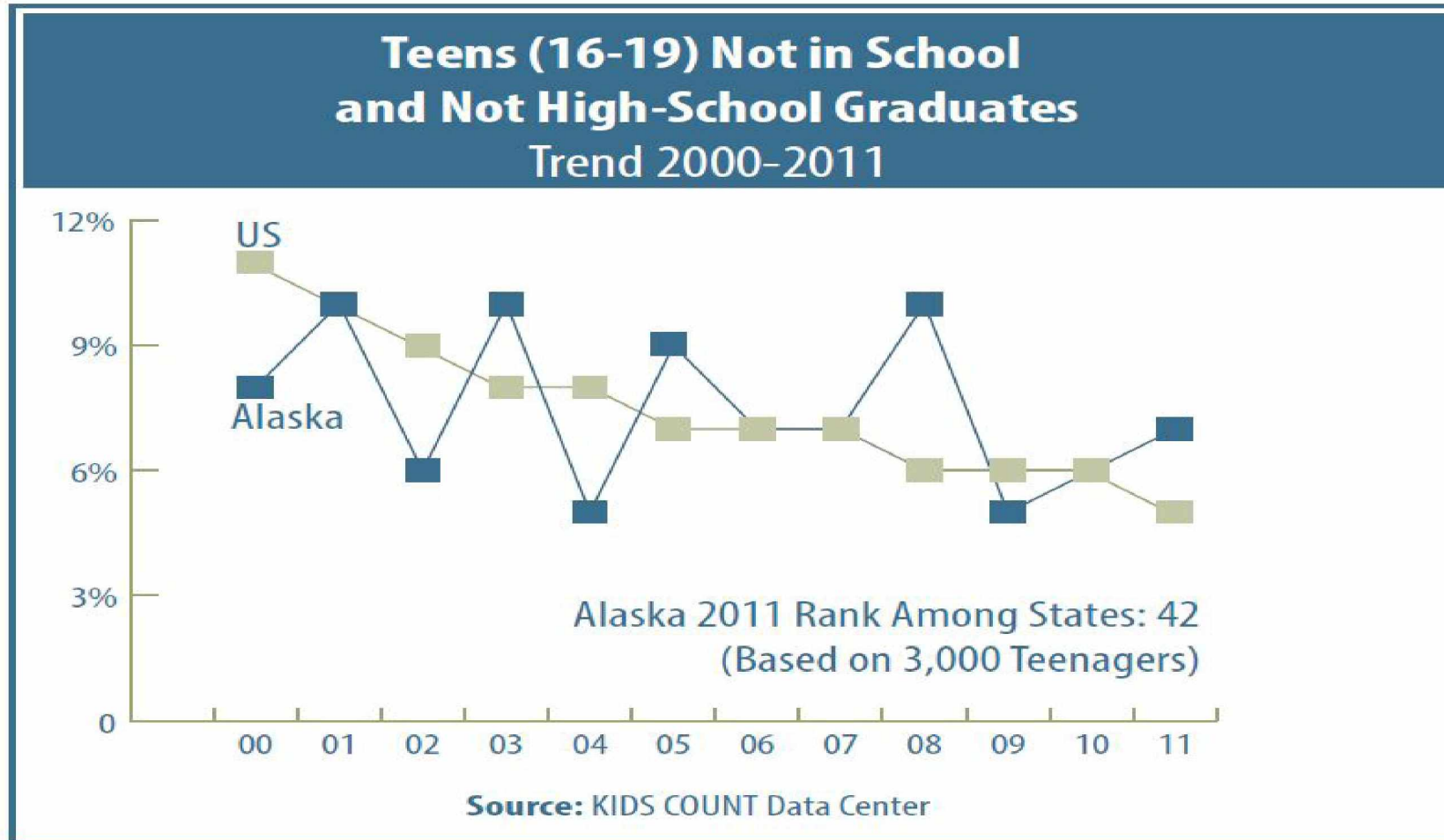
Methodology



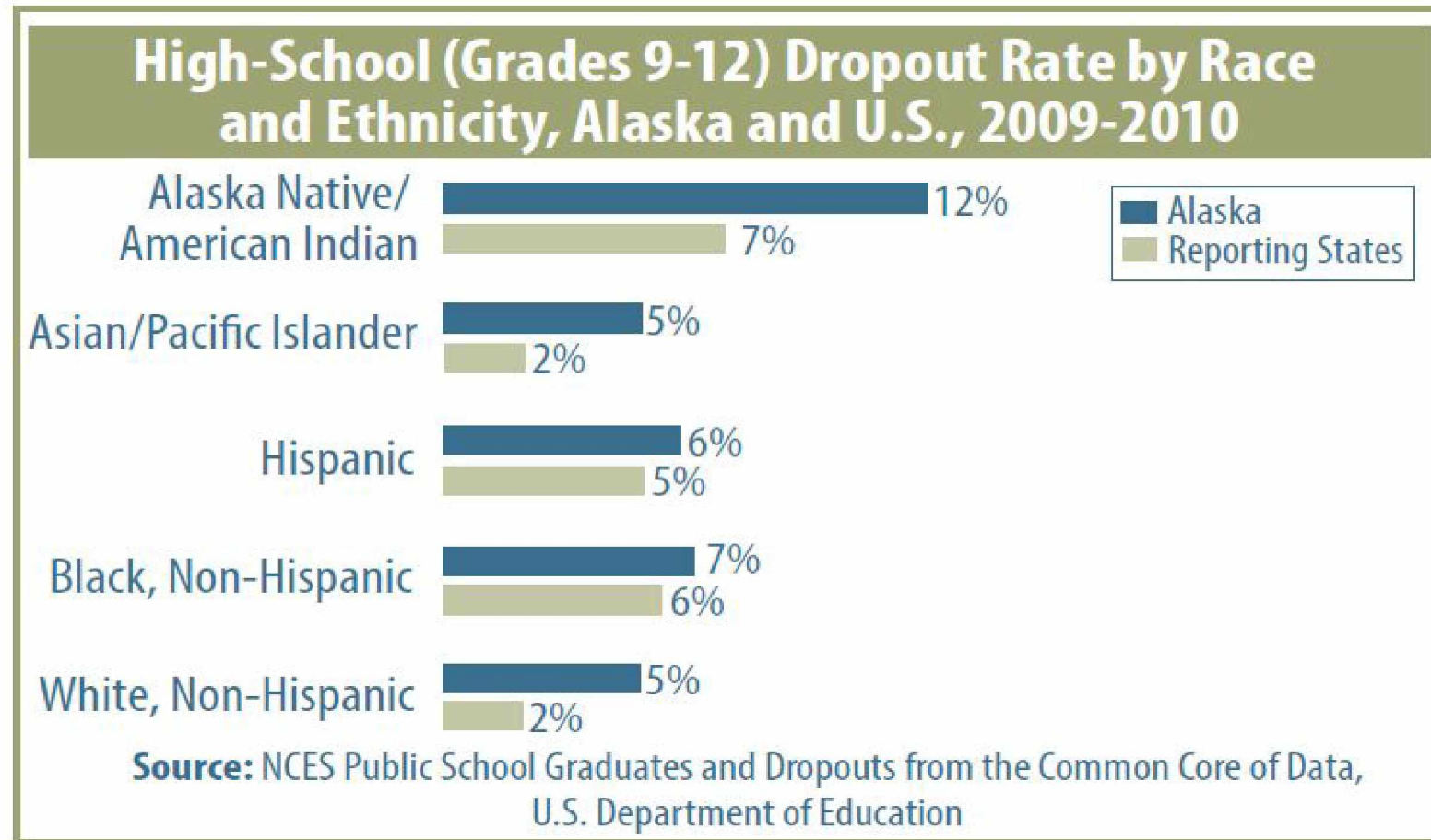
Literature Review



Alaska Native Graduation Rates

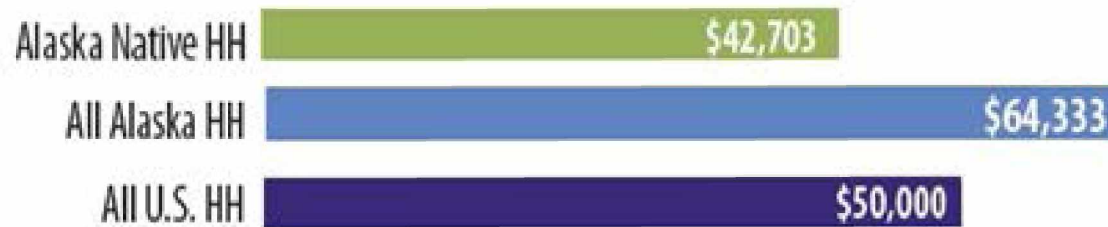


Alaska Native Graduation Rates



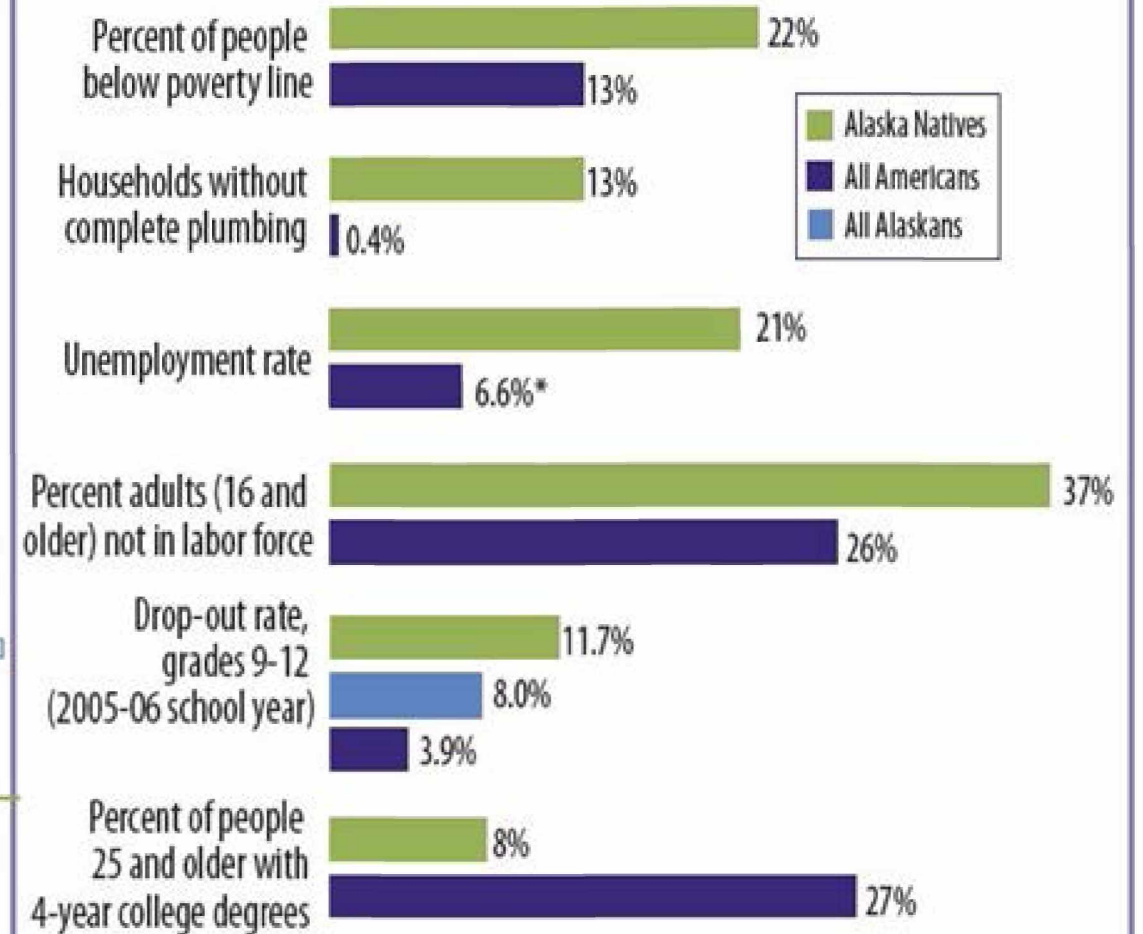
Economic Indicators

Median Household Income (In 2007 Dollars)



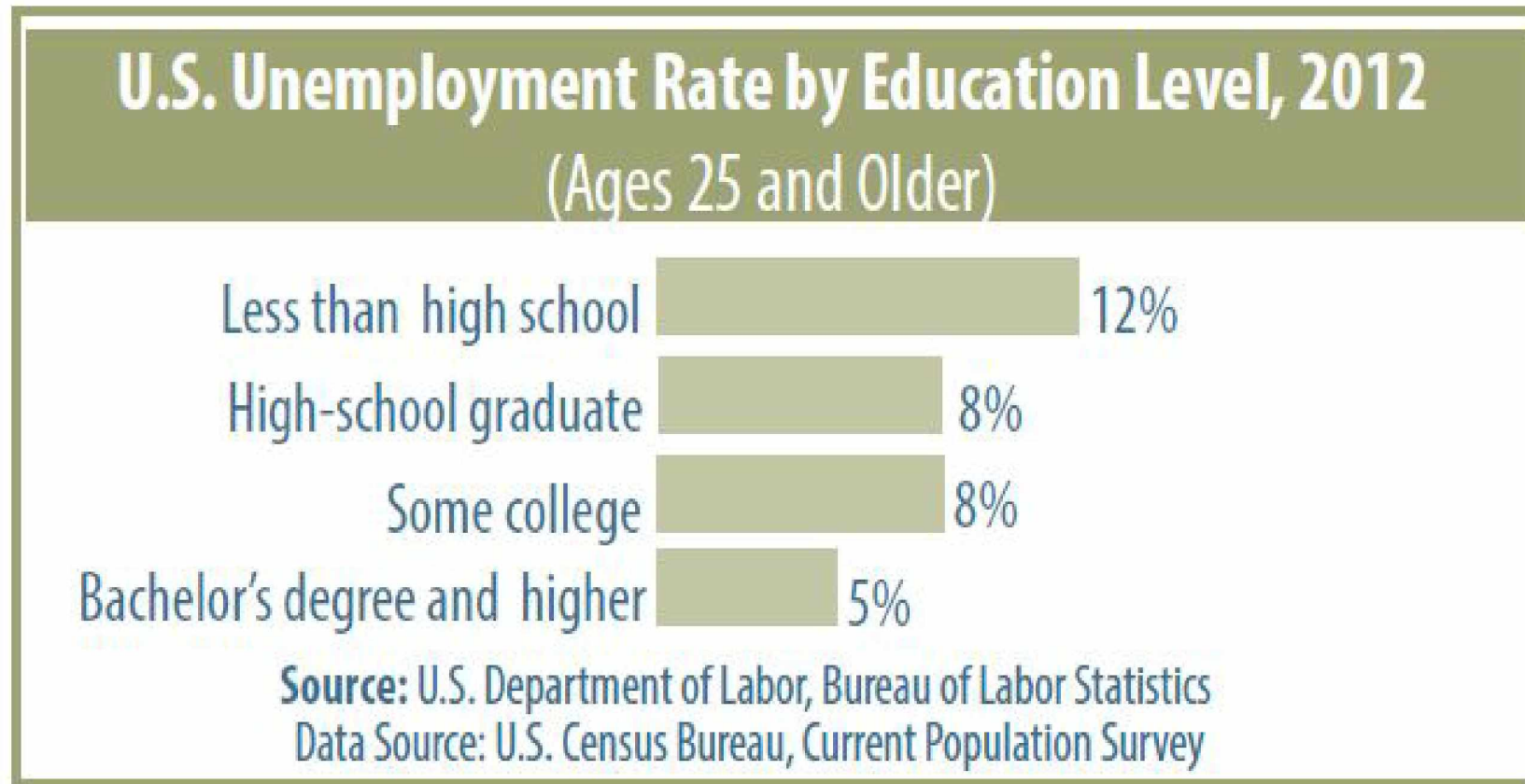
Median income for the village of Tatitlek: \$21,563
 Unemployment Rate for the village of Tatitlek: 8.9%

Figure 1. Economic Indicators, Alaska Natives and All Americans
 (Averages, 2005-2007)

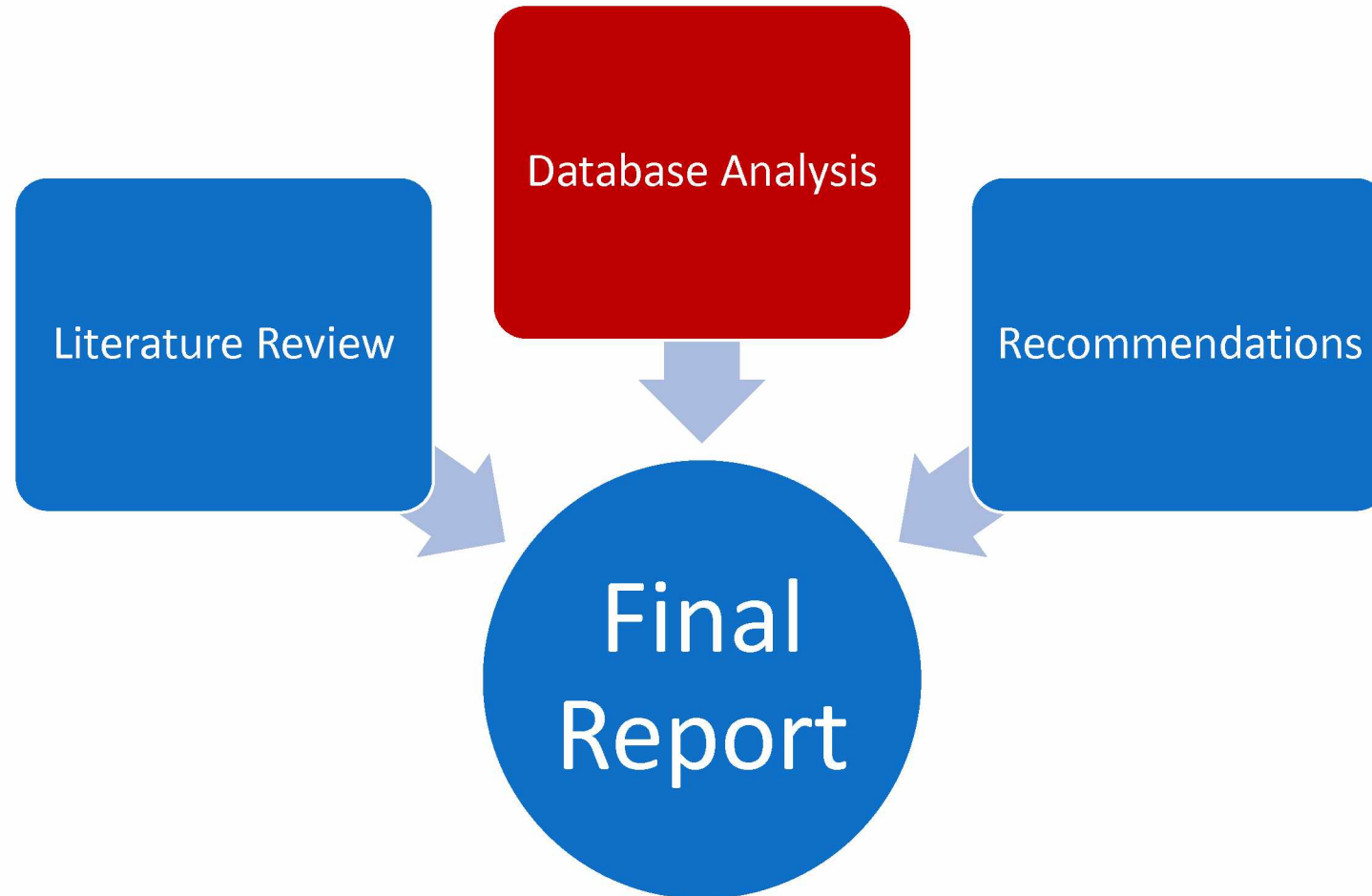


Sources: U.S. Census Bureau, American Community Survey, 2005-2007; US Department of Education, National Center of Education Statistics, Common Core of Data

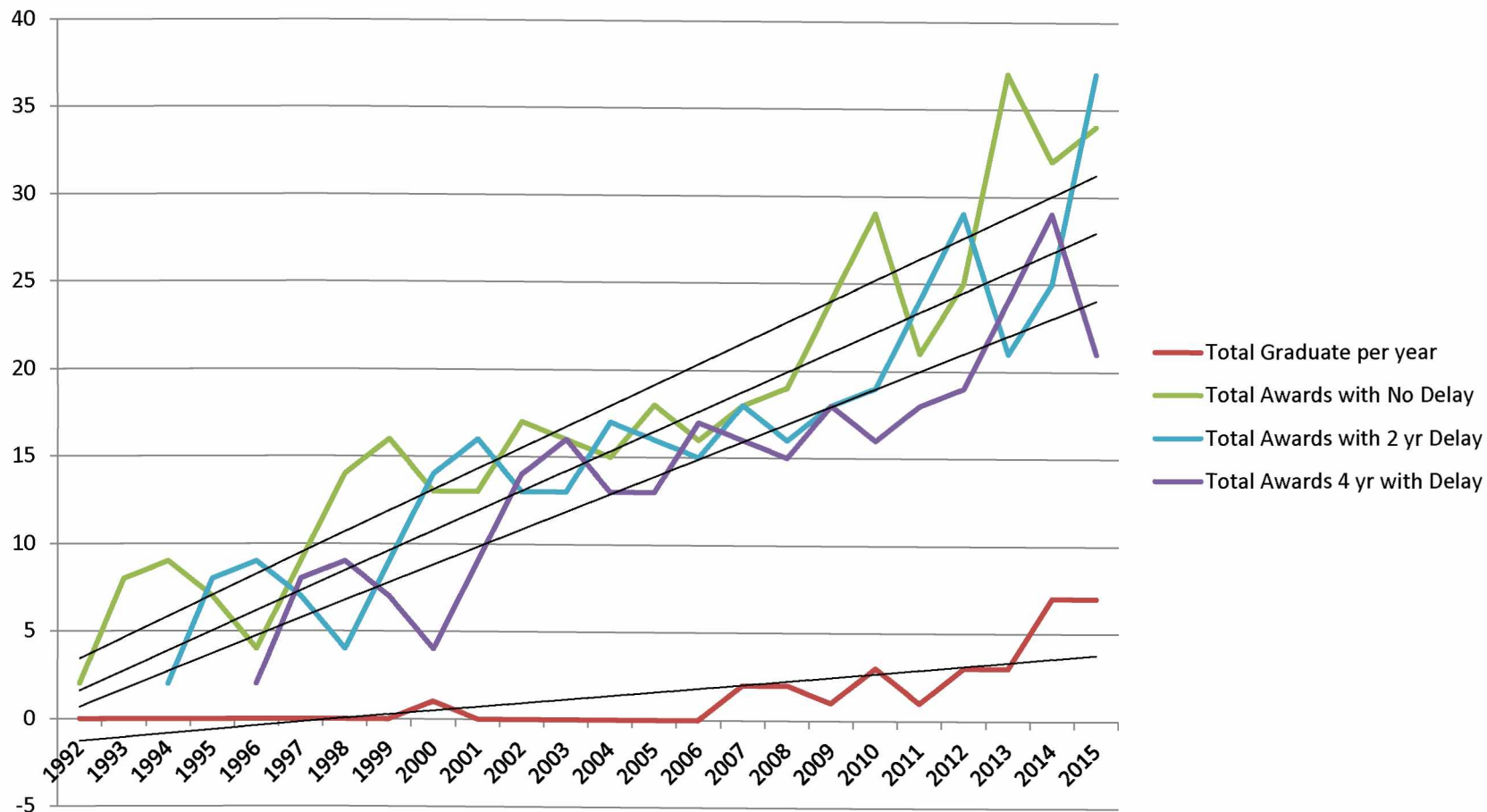
Why does this matter to the project?



Data Analysis



Data Analysis



Correlation Results

Correlation with no delay to account for delay in degree: 0.79

Correlation with two year delay to account for 2 year degrees: 0.78

Correlation with four year delay to account for 4 year degrees: 0.72

Conclusion



Conclusion

- Statistically speaking this correlation is considered strong.
- Students attempting college are increasing.
- Number of graduates are increasing.

Recommendation

- Continue the scholarship and career grant program.
- Secure funding for shareholder and descendants by diversifying financial portfolio.
 - Develop a Financial Sustainability Plan
 - Board Solicitations
 - Gaming License
 - Alumni Association
 - Pick Click Give Campaign

Further Research

- Students may be leaving school for other reasons other than financial challenges.
- I suggest further research interviewing students who have left high school or college. The results may lead to insights to other programs that encourage career development or higher education.

Product Deliverables

- Organizational Assessment
 - Current Financial Standing
 - SWOT Analysis
 - Shareholder Demographics
- Financial Development Plan
 - Revenue generating activities for the next 5 years

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The Product

Funding raising activities

- Board Solicitation
- Alumni Membership Program
- Pick Click Give Campaign
- Raffle

The start of all of the activities could be completed within 2016 fiscal year

Next Steps: Build a PMP Plan for all approved projects



Acceptance Criteria

- All stakeholder requirements have been met and accounted for in the WBS and Project Schedule. - **accepted**
- Product is in alignment with the Copper Mountain Foundation Mission, Vision and Values. - **accepted**
- Product passed legal and financial reviews.- **accepted**

Critical Success Factors

Project was on schedule. All milestones on the critical path were met within tolerances. – SPI = .97
Within accepted tolerances in metrics management plan

Project Deliverables were approved by Student Advisory Committee and Sponsor. – Received a GO status

Data Collection and analysis is completed by PM 686B PPM#3. - Research Methodology reviewed and approved by Lead Student Advisor

All stakeholder requirements were met. See Section 9.1 for complete Stakeholder Requirements. - Requirements were met

Timely Communication with Student Advisory Committee and Sponsor. – Stakeholder Communication was tracked in the Knowledge Area Updates

Next Steps

- Currently at 95%
- Final Knowledge Area Review
- Finalize Lessons Learn Database
- Update Project Schedule
- Put together final documents package



Lessons Learned

- Identify project before the start of 686A
- Clearly define scope within the first week of 686A
- Work with a sponsor that has clear communication skills and time to commit
- Build a buffer or implement risk responses in the project schedule
- Ask questions and utilize your Student Advisory Committee
- Clear up any misunderstanding you may have with the PPM's
- Organize! (Google Docs or Blackboard Collaboration Area)

Student Advisory Committee

- Roger Hull, Primary Advisor
- LuAnn Piccard, Committee Member
- Seong Dae Kim, Committee Member



Announcement



Angela Totemoff
President
Copper Mountain Foundation

Questions?



Lessons Learned

Project: The Copper Mountain Project: Financial Analysis and Sustainability Plan for the Copper Mountain Foundation A 501(C) 3

Overview

This is a comprehensive list of lessons learned that came from the planning, execution, monitoring and controlling, an closing phases of the Copper Mountain Project; A Financial Analysis and Sustainability Plan for The Copper Mountain Foundation, A 501(c)3.

Course Lessons Learned

The following are lessons learned about the PM686A and PM 686B course requirements.

Understand the Knowledge Area Application

This course required that the project manager choose three or four project management knowledge areas to focus on to demonstrate application and mastery throughout the project. It is worth putting some thought into what areas to choose. The demonstration of mastery implies that there is a clear understanding the knowledge area, the focus area, the tools needed, the assessment that will be used, the actual results of the findings, and the take-always from those results. The results should be measureable. At the beginning of the project I did not put a lot of thought into what areas to focus on so I did not have a clear idea of what I was measuring. Additionally, I did not have the assessment or the actual findings. As a result I lost valuable measurements of my knowledge areas. My recommendation is to research the knowledge areas and set up the actual reporting structures at the beginning of the course. This will ensure that the correct data is collected from the beginning of the course.

Pay Attention to Deadlines

Attention to deadlines is important because part of the grade is based on on-time submissions of the deliverables. Failure to meet the deadlines may result in a lower grade in the course, and an unprofessional reputation. The course project will have at least two very important stakeholders. One is the Student Advisory Committee, and the other is the Sponsor. Both will have deadlines for project, and research/product that will be created. It is also important to note that the course has many deadlines to follow. During execution of this project I missed a few deadlines from lack of attention to the details. As a result I lost some points for late submissions. My recommendation is to add in the deadlines as milestones the Microsoft Project as well as a personal calendar. This will ensure that deadlines are missed or overlooked.

Start the Literature Review Early

The course will require a literature review. It's important to start the research early. Since the literature review requirements are so broad, take time to refine the research. Take time to identify what elements that will be included in the final report. My recommendation is to choose a topic before the beginning of PM686B and begin to write the literature portion of the paper as soon as possible. My topic was chosen early, however, I did not start to write the report until the second half of PM686B. As a result, my time was over allocated and I needed to take time off of work to complete the report. Writing this report took longer than anticipated. My recommendation is to start writing the review at the beginning of the course and build in risk responses to account for any additional time you may need to complete the report.

Complete the Data Collection Early

During PM686B the focus will be on the data analysis. This implies that the data collection is complete. The data analysis can reveal other risk occurrences. The data may be incomplete or inconclusive. It's important to be prepared for these risk occurrences. Data collection the Copper Mountain Project was collected early, however the data analysis was done later in the course. The data analysis lead to the discovery to more needed further analysis. However, due to time constraints this wasn't possible to complete within the time frame of the course. My recommendation is to complete the data collection before the start of PM686B, and start the data analysis within the first half of PM686B.

Work Ethic is important

Understand that what is being created is contributing to the project management body of knowledge. The project final deliverables will also be posted publically. Considering those facts it's important to produce project deliverables of high quality. One important tip that was received during execution was to not consider the deliverables a homework submission. Instead, treat the project like a work deliverable. During project execution, this was considered before each deliverable due date and as a result the quality of the deliverables was increased. My recommendation is to adopt this philosophy when producing the project deliverables.

Project Lessons Learned

The following are lessons learned from the execution, and monitoring and controlling of the project.

Build a Buffer for Major Deliverables

The project will have deliverables with due dates. As noted above, there are many deadlines for this course. For large deliverables, it's important to build in buffers to account for risk occurrences that may set back your project. During execution of the project, there were several risk occurrences that were not anticipated. The result was late submissions of work, and over allocation of the available resources. I recommend building a large buffer, and building a robust risk registry complete with risk responses.

Understand Scope

It's important to understand the scope of the project. Without a clear understanding the scope there is a risk that the product or outcome of the project will not meet the needs of the stakeholders. During execution of this project, the scope was not clearly defined until the middle of PM686A. My recommendation is to clearly define the project scope before the start of PM686A.

Knowledge Area Application

Project: The Copper Mountain Project: Financial Analysis and Sustainability Plan for the Copper Mountain Foundation A 501(C) 3

Scope Management

The objective is to ensure that the project scope is within stakeholder requirements and all changes are documented. Managing the scope of this project will produce a precise product that the CMF Board can approve and ensure that scope creep will not occur which can delay the progress of the project. Lastly tracking the changes will ensure stakeholder requirements aren't effected by the changes.

Focus	Tools	Assessment
Change Management	<ul style="list-style-type: none">• Change Request Log• Change Log• Requirements Traceability Matrix	Determine if Change Requests alter Stakeholder Requirements.

Results

All change requests that were requested resulted in zero changes in stakeholder requirements.

Lessons Learned

Processing the change requests were easy, and adding the additional step of referring to stakeholder requirements added a new level of assurance that scope creep was not occurring and that the changes were safe to implement. This also made the stakeholder requirements clear.

Schedule Management

The objective is to ensure the schedule remain on time. Ensure all slippages are accounted for. Since this project must be executed with the timeframe of a semester, monitoring and managing the schedule will ensure the success of the project.

Focus	Tools	Assessment
Controls	<ul style="list-style-type: none">• Updated MS Project Schedule• Project Progress Report• Risk Realization Log	Track No. of tasks completed out of order in schedule.

Results

Tasks in the schedule were monitored during execution to ensure that the schedule was accurate. One task was completed out of order of in the project; however this task actually had an incorrect successor. This is corrected and the updated result was zero tasks that were out of order.

Lessons Learned

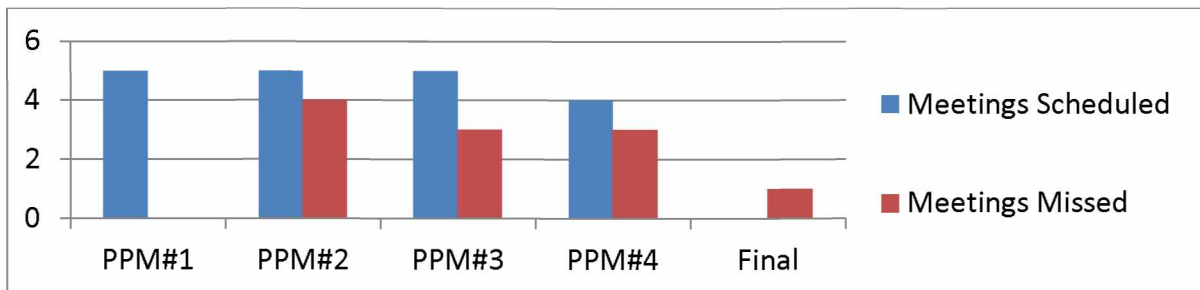
Throughout the project I documented risks that have occurred that have caused schedule slippages. Rework of deliverables was successful planned in the schedule that may have led to schedule delays. Tracking the schedule made the project schedule a true, live, updated document.

Stakeholder Management

The objective is to communicate with all stakeholders. Communication is the key component of stakeholder management. Maintaining communication will ensure that the project manager receives feedback from stakeholders of the project.

Focus	Tools	Assessment
Communication	<ul style="list-style-type: none"> • Expectation's Contract • Stakeholder Identification • Stakeholder Communication Preference Sheet • Communication Matrix 	PM will track No. of scheduled meetings that were made and how many meetings were missed with Key Stakeholders.

Results



Lessons Learned

Focusing on communication and tracking meeting schedules helped me focus on meeting agendas and issues that needed to be addressed. Missed meetings were missed opportunities to gain valuable input to project.

One Page PM 686B Project Status Report Dashboard

Name: Angela Totemoff Date: 09/04/2015

Project Title: The Copper Mountain Project

Synopsis of Project		Progress Since Last Report	
<p><i>What it's about and what it will deliver?</i></p> <p>The Copper Mountain Project will produce a Financial Analysis and Sustainability Plan for the Copper Mountain Foundation, a 501(C) 3 that provides scholarships and career grants to shareholders and descendants of The Tatitlek Corporation.</p>		<p><i>Key tasks completed and key tasks started.</i></p> <p>Completed:</p> <ul style="list-style-type: none"> - Completed 686A - PMP - Raw data gathered - Plan outline completed 	
Current Status		Forecast	
<p><i>Where am I now? Am I on track to meet next PPM deliverables?</i></p> <ul style="list-style-type: none"> - Marked Yellow because I feel that my PMP should have been updated over the summer. - Already have change control process in place. - Already have Metrics Management Plan. - Need to update my PMP to reflect organizational changes 	X	<p><i>Is project tracking to next PPM and beyond towards project completion? (Big picture view)</i></p> <ul style="list-style-type: none"> - Update Gantt Chart and WBS - Create a Risk Management Plan - Create and update a Risk Response Log - Create Lessons Learned - Get final GSP signed - Complete Expectations Contract 	
Anticipated Changes/Key Risks/Corrective Actions		Key Takeaways/Where Help Needed	
<p><i>Imminent change, risks/responses, and corrective actions/timing required to keep project on track.</i></p> <ul style="list-style-type: none"> - Need to updated PMP ASAP. 		<p><i>Wrap up with key items and where help needed from stakeholders.</i></p> <ul style="list-style-type: none"> - Need to ask SAC about the final draft format. - Are my critical success factors, KPI's, and Acceptance Criteria in alignment? 	

One Page PM 686B Project Status Report Dashboard

Name: Angela Totemoff Date: 09/24/2015

Project Title: The Copper Mountain Project

Synopsis of Project		Progress Since Last Report	
<i>What it's about and what it will deliver?</i> The Copper Mountain Project will produce a Financial Analysis and Sustainability Plan for the Copper Mountain Foundation, a 501(C) 3 that provides scholarships and career grants to shareholders and descendants of The Tatitlek Corporation.		<i>Key tasks completed and key tasks started.</i> Completed: <ul style="list-style-type: none"> - Completed PMP Update - Started Completing my product. It will be complete by Sept 30 as scheduled. - Created Final Report Paper. I have all of the tabs in place 	
Current Status		Forecast	
<i>Where am I now? Am I on track to meet next PPM deliverables?</i> <ul style="list-style-type: none"> - Marked Yellow only because I never feel fully up to date on my project. However, I am cautiously optimistic about my current standing. 	X	<i>Is project tracking to next PPM and beyond towards project completion? (Big picture view)</i> <ul style="list-style-type: none"> - We are on track at 78% complete. Larger hurdles are ahead such as completing the product and getting the first draft of the final report complete. 	
Anticipated Changes/Key Risks/Corrective Actions		Key Takeaways/Where Help Needed	
<i>Imminent change, risks/responses, and corrective actions/timing required to keep project on track.</i> <ul style="list-style-type: none"> - I have a question into my legal rep about organization financial information being included in my plan. I may have to remove it from the final draft. 		<i>Wrap up with key items and where help needed from stakeholders.</i> <ul style="list-style-type: none"> - Are my critical success factors, KPI's, and Acceptance Criteria in alignment? 	

One Page PM 686B Project Status Report Dashboard

Name: Angela Totemoff Date: 10/15/2015

Project Title: The Copper Mountain Project

Synopsis of Project		Progress Since Last Report	
<p><i>What it's about and what it will deliver?</i></p> <p>The Copper Mountain Project will produce a Financial Analysis and Sustainability Plan for the Copper Mountain Foundation, a 501(C) 3 that provides scholarships and career grants to shareholders and descendants of The Tatitlek Corporation.</p>		<p><i>Key tasks completed and key tasks started.</i></p> <p>Completed:</p> <ul style="list-style-type: none"> - Continued updates to Change/Risk logs - Continued updates to PMP. - Created Final Report TOC. - Completed PPM#2 Deliverables 	
Current Status		Forecast	
<p><i>Where am I now? Am I on track to meet next PPM deliverables?</i></p> <ul style="list-style-type: none"> - SPI is at .97. - Delay in Product delivery occurred. An element of my product needed further research. Research was delayed due to work and convention obligations. - Will complete Product by Oct 18. 	X	<p><i>Is project tracking to next PPM and beyond towards project completion? (Big picture view)</i></p> <ul style="list-style-type: none"> - We are currently at 85% complete. Larger hurdles are ahead such as completing the product and getting the first draft of the final report complete. 	
Anticipated Changes/Key Risks/Corrective Actions		Key Takeaways/Where Help Needed	
<p><i>Imminent change, risks/responses, and corrective actions/timing required to keep project on track.</i></p> <ul style="list-style-type: none"> - Had to do some schedule crashing to complete PPM#2 on time. I was able to successfully stay on schedule with the exception of product completion. 		<p><i>Wrap up with key items and where help needed from stakeholders.</i></p> <ul style="list-style-type: none"> - Lesson Learned for this session: Always make scheduled meetings, regardless of incomplete deliverables or agenda. 	

One Page PM 686B Project Status Report Dashboard

Name: Angela Totemoff Date: 11/13/2015

Project Title: The Copper Mountain Project

Synopsis of Project		Progress Since Last Report	
<i>What it's about and what it will deliver?</i> The Copper Mountain Project will produce a Financial Analysis and Sustainability Plan for the Copper Mountain Foundation, a 501(C) 3 that provides scholarships and career grants to shareholders and descendants of The Tatitlek Corporation.		<i>Key tasks completed and key tasks started.</i> Completed: <ul style="list-style-type: none"> - Continued updates to Change/Risk logs - Continued updates to PMP. - Finished Product of project. - Completed PPM#3 Deliverables 	
Current Status		Forecast	
<i>Where am I now? Am I on track to meet next PPM deliverables?</i> <ul style="list-style-type: none"> - Delay in Product delivery occurred. An element of my product needed further research. Set up PPM#4. Working in finishing touches to Final Report 	X	<i>Is project tracking to next PPM and beyond towards project completion? (Big picture view)</i> <ul style="list-style-type: none"> - We are currently at 89% complete. Larger hurdles are ahead such as completing the product and getting the first draft of the final report complete. 	
Anticipated Changes/Key Risks/Corrective Actions		Key Takeaways/Where Help Needed	
<i>Imminent change, risks/responses, and corrective actions/timing required to keep project on track.</i> <ul style="list-style-type: none"> - Had to do some schedule crashing to complete PPM#2 on time. With PTO I was able to stay on schedule. 		<i>Wrap up with key items and where help needed from stakeholders.</i> <ul style="list-style-type: none"> - Lesson Learned for this session: Build a buffer! - Need help with line regression analysis. 	

The Copper Mountain Project: Financial Analysis and Sustainability Plan for the Copper Mountain Foundation A 501(C) 3

By: Angela Totemoff

PM686B – Final Capstone Project

Fall 2015

Master of Science Project Management

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Project Manager: Angela Totemoff, UAA, MSPM Student

Project Sponsor: Sheri Buretta, Copper Mountain Foundation, Board Member

Project Committee: Roger Hull, UAA, Faculty
LuAnn Piccard, UAA, PM Department Chair
Seong Kim, UAA, Faculty

Prepared By: Angela Totemoff, Document Owner

Prepared For: Project Committee
Sheri Buretta, Copper Mountain Foundation Board Member

Project Management Plan Version Control:

Version	Date	Author	Change Description
1	1/30/2015	Angela Totemoff	PMP Created
2	4/30/2015	Angela Totemoff	PM 686B Final Version Created. Added subsidiary plans and graphs
3	9/15/2015	Angela Totemoff	Changed final formatting to reflect final format of research paper. Created version control log.
4	9/17/2015	Angela Totemoff	Updated Project Scope Statement. Added Subsidiary Plans: Scope, Risk, Stakeholder, and Communications

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1 PROJECT SCOPE STATEMENT

1.1 BUSINESS CASE

Part of the mission statement of The Tatitlek Corporation states that “we strive to bridge the traditions of our village with global economic opportunity enhancing the quality of life for our shareholders.” The Copper Mountain Foundation is an important vehicle that provides financial assistance to achieve that goal of enhancing shareholder’s lives. Therefore, ensuring that these programs continue to be offered verifies that The Tatitlek Corporation is fulfilling its mission.

1.2 PROJECT PURPOSE

The purpose of this project is to create a Financial Analysis and Sustainability Plan for the Copper Mountain Foundation, which provides guidance on possible revenue making endeavors that are within the capabilities of the organization. When complete the Copper Mountain Project will increase understanding of the organizations programs and services, and provide a goal for financial growth and sustainability.

1.3 SCOPE DESCRIPTION

To plan, execute, and monitor the creation a Financial Analysis and Sustainability Plan for the Copper Mountain Foundation that includes current organization financial analysis and a financial development plan, while incorporating the UAA MSPM 686A course requirements and deadlines. The scope includes a Project Management Plan, a Financial Analysis and Sustainability Plan, a final presentation, and a twenty page project paper that describes the project and product deliverables. The project will start on January 16, 2015, and will end on December 15, 2015.

1.4 PROJECT OBJECTIVES

- Demonstrate mastery of MSPM Program Learning Outcomes.
- Create documents that meet the requirements of PM 686A and PM 686B.
- Create a Project Management Plan.
- Execute and Monitor the Project Management Plan.
- Collect and analyze data in a written report form that meets the requirements of PM 686A.
- Create a Financial Analysis and Sustainability Plan for the Copper Mountain Foundation.

1.5 STRATEGY

The project strategy, the Project Manager will utilize the expertise of the student advisory committee, the sponsor, and the Student Advisory Committee (SAC) to create a robust PMP and Financial Analysis and Sustainability Plan that meets all of the course and stakeholder requirements. They will also aid the Project Manager in conceptual design, and advise on research methods.

1.6 STAKEHOLDER IDENTIFICATION

The following stakeholders have been identified for this project. A full stakeholder analysis can be found in the Stakeholder Management Plan.

STAKEHOLDER	INTERNAL/ EXTERNAL
CMF BOARD MEMBERS	Internal
CMF PRESIDENT	Internal
TTC ASSISTANT CONTROLLER	Internal
TTC VP OF FINANCE	Internal
PROJECT MANGER	Internal
TEAM MEMBER 1 (MICHELLE)	Internal
STUDENT ADVISORY COMMITTEE	External
LEIGH MCGEE	External
CMF PROGRAM RECIPIENTS	External

1.7 PROJECT START AND COMPLETION

The project will begin on January 16, 2015 with the start of PM 686A. The Project will be done in three (3) Phases. Phase One, Planning, will begin on January 16, 2015 with the start of PM 686A, to create the Project Management Plan. Phase one will be complete on April 28, 2015, at the end of the spring 2015 semester. Phase two (2) and three (3), executing and closing will begin on August 30, 2015, with the start of PM 686B, to create the Financial Analysis and Sustainability Plan (Product). Phase two (2) and three (3) will be complete by December 15, 2015, at the end of the fall 2015 semester.

	PHASE START CRITERIA	PHASE END CRITERIA
PHASE ONE – PLANNING	<ul style="list-style-type: none"> PM accepted into PM686A Project Sponsor Approved Charter 	<ul style="list-style-type: none"> All deliverables completed and accepted by SAC. Last day of instruction for PM 686A
PHASE TWO – EXECUTING	<ul style="list-style-type: none"> PM accepted into PM686B 	<ul style="list-style-type: none"> Product deliverable complete Research is complete
PHASE THREE - CLOSING	<ul style="list-style-type: none"> All research and data has been collected 	<ul style="list-style-type: none"> All deliverables completed and accepted by SAC and Sponsor Last day of instruction for PM 686B

1.8 MILESTONES

The milestones and deliverables due are listed in the chart below.

PROJECT MILESTONES	TARGET DATE
RECEIVE AND FILE SPONSOR APPROVAL OF CHARTER	Wed 1/21/15
PPM#1 DELIVERABLES DUE	Fri 1/30/15
PPM#2 DELIVERABLES DUE	Fri 2/20/15
PPM#3 DELIVERABLES DUE	Fri 3/13/15
GO/NO GO DECISION #1	Fri 3/13/15
UAA IRB SUBMITTAL COMPLETE BY MARCH 27TH	Fri 3/27/15
FINAL 686A DELIVERABLES DUE	Tue 4/28/15

DATA COLLECTION COMPLETE	Tue 6/30/15
START OF 686B	Mon 8/24/15
PRODUCT DEVELOPMENT COMPLETE	Wed 9/30/15
FINAL PRESENTATION	Fri 9/18/15
FINAL PRODUCT AND RESEARCH PAPER SUBMITTED - PROJECT COMPLETE	Tue 12/15/15

1.9 EXCLUSIONS

The following are not included in the scope of this project:

- Completed 12 Month Activities Plan
- Project schedule for marketing and finance plan
- Arrangements for Special Board Meeting to approve the Financial Analysis and Sustainability Plan
- No funding is dedicated to this plan or product

1.10 ASSUMPTIONS (LOW PROBABILITY RISKS)

Several assumptions have been identified for the project. All stakeholders must be mindful of these assumptions as they introduce some level of risk to the project until they're confirmed to be true. During the project planning cycle every effort must be made to identify and mitigate any risk associated with the following assumptions:

- Sponsor has time to review and approve Project Documents.
- Project is supported by Copper Mountain Foundation Board of Directors.
- Student Advisory Committee will provide feedback for every PPM.
- PM has access to Microsoft Project, WBS Chart Pro, Blackboard, and Excel.

1.11 CRITICAL SUCCESS FACTORS

- Project was on schedule. All milestones on the critical path were met within tolerances.
- Project Deliverables were approved by Student Advisory Committee and Sponsor.
- Data Collection and analysis is completed by PM 686B PPM#3.
- All stakeholder requirements were met. See Section 9.1 for complete Stakeholder Requirements.
- Timely Communication with Student Advisory Committee and Sponsor.

1.12 ACCEPTANCE CRITERIA

Acceptance criteria have been established for the project to ensure thorough vetting and successful completion of the project. All acceptance criteria must be met in order to achieve success for this project:

A deliverable will be accepted by the Sponsor if it meets the following criteria:

- All stakeholder requirements have been met or completed and accounted for in the WBS and Project Schedule.
- Financial Analysis and Sustainability Plan is in alignment with the Copper Mountain Foundation Mission, Vision and Values.
- Financial Analysis and Sustainability Plan passed legal and financial reviews.

The project will be accepted by the Student Advisory Committee if meets the following criteria:

- PPM Deliverables have been submitted and scored with a 75% or higher.
- Courses PM 686A and PM 686B received a final grade of 'B' or higher.

1.13 KEY PERFORMANCE INDICATORS

The following KPI's will be tracked and reported on the following report schedule. See Section 7 Metrics Management Plan for thresholds. See Appendix E to see the full Status Report Template.

PROGRESS REPORT COMPONENTS	DATES	REPORT #
SCHEDULE VARIANCE INDEX (SPI)	Jan 30, 2015	686A PPM#1 Report
COST PERFORMANCE INDEX (CPI)	Feb 20, 2015	686A PPM#2 Report
CUMULATIVE COST CURVE, PLANNED VALUE (PV)	March 13, 2015	686A PPM#3 Report
ACTUAL COST CURVE (AC)	Apr 10, 2015	686A PPM#4 Report
EARNED VALUE CURVE (EV)	Sept 18, 2015	686B PPM#1 Report
MILESTONES MET	Oct 9, 2015	686B PPM#2 Report
RISK REALIZATION	Oct 23, 2015	686B PPM#3 Report
CHANGE LOG	Nov 4, 2015	686B PPM#4 Report
WORK PLANNED FOR NEXT WEEK		
KNOWLEDGE AREA APPLICATION UPDATE		

1.14 CONSTRAINTS

Several constraints have been identified for this project. All stakeholders must remain mindful of these constraints as they must be carefully planned for to prevent any adverse impacts to the project's schedule, cost, or scope. The following constraints have been identified.

- Project schedule is constrained by course deadlines.
- PPM's must be delivered on due date.
- Preferred method of communication with Sponsor is email or short phone calls to minimize work disruption.

1.15 PRIORITY CONSTRAINT MATRIX

	ACCEPT	CONSTRAINT	ADJUST
SCOPE			X
SCHEDULE		X	
COST	X		

1.16 PROJECT SCHEDULE

The project schedule is below. The tasks that have a strike through are risk responses as set up in Microsoft Project. The tasks with zero (0) for duration are milestones. See Attachment B to view complete Gantt chart.

WBS	Task Name	Duration	Start	Finish
1	A Project Management Plan for Creating a Financial Analysis and Sustainability Plan for the Copper Mountain Foundation	237 days	Fri 1/16/15	Tue 12/15/15
1.1	Planning	72 days	Fri 1/16/15	Tue 4/28/15
1.1.1	IRB Process	39 days	Fri 1/16/15	Wed 3/11/15
1.1.1.1	Create IRB Account	0.13 days	Fri 1/16/15	Fri 1/16/15
1.1.1.2	Complete IRB/CITI Training	38.88 days	Fri 1/16/15	Wed 3/11/15
1.1.1.3	Email IRB Rep with description of study - Verify if IRB Review is needed	1 day	Wed 3/11/15	Wed 3/11/15
1.1.1.4	IF IRB Needed - Write IRB Proposal	2 days	Thu 3/12/15	Fri 3/13/15
1.1.1.5	Submit for IRB Approval	10 days	Mon 3/16/15	Fri 3/27/15
1.1.1.6	RISK - IRB Proposal Not Approved - Redraft and Resubmit	10 days	Mon 3/30/15	Fri 4/10/15
1.1.2	PPM#1	26 days	Fri 1/16/15	Fri 2/20/15
1.1.2.1	Create Stakeholder Identification and Analysis Documentation	1 day	Fri 1/16/15	Fri 1/16/15
1.1.2.2	Create Charter	3 days	Mon 1/19/15	Wed 1/21/15
1.1.2.2.1	Draft Charter	1 day	Mon 1/19/15	Mon 1/19/15
1.1.2.2.2	Email Charter to Sponsor for Approval	1 day	Tue 1/20/15	Tue 1/20/15
1.1.2.2.3	Risk - Unapproved Charter - Make assigned changes and resubmit	1 day	Wed 1/21/15	Wed 1/21/15
1.1.2.2.4	Receive and file Sponsor Approval of Charter	0 days	Wed 1/21/15	Wed 1/21/15
1.1.2.3	Create Project Schedule	0.5 days	Thu 1/22/15	Thu 1/22/15
1.1.2.4	Create Prelim WBS	1 day	Thu 1/22/15	Fri 1/23/15
1.1.2.5	Draft 200 word Project Abstract	1 day	Fri 1/23/15	Mon 1/26/15
1.1.2.6	Collect Letter of support from Sponsor	1 day	Mon 1/26/15	Tue 1/27/15
1.1.2.7	Submit prelim GSP	2 days	Tue 1/27/15	Thu 1/29/15
1.1.2.7.1	Collect 2 Syllabi from APU Instructors	1 day	Tue 1/27/15	Wed 1/28/15
1.1.2.7.2	GSP Submitted to office	1 day	Wed 1/28/15	Thu 1/29/15
1.1.2.8	Choose 3 Knowledge Areas	1 day	Thu 1/29/15	Fri 1/30/15
1.1.2.9	PPM#1 Deliverables Due	0 days	Fri 1/30/15	Fri 1/30/15
1.1.2.10	SAC Review PPM#1	0.09 days	Mon 2/16/15	Mon 2/16/15
1.1.2.11	Risk Response - Deliverables not approved/Need Improvement - Redraft and Resubmit	2 days	Thu 2/19/15	Fri 2/20/15
1.1.3	PPM#2	26 days	Fri 1/30/15	Fri 3/6/15
1.1.3.1	Create Project Scope Statement	2 days	Fri 1/30/15	Mon 2/2/15
1.1.3.2	Create Requirements Documentation	2 days	Tue 2/3/15	Wed 2/4/15
1.1.3.2.1	Interview Sponsor, team members, legal/finance on requirements	1 day	Tue 2/3/15	Tue 2/3/15
1.1.3.2.2	Draft Requirements Traceability Matrix	1 day	Wed 2/4/15	Wed 2/4/15
1.1.3.3	Draft TOC for PMP	2 days	Thu 2/5/15	Fri 2/6/15
1.1.3.4	Draft TOC of Final Report	1 day	Mon 2/9/15	Mon 2/9/15
1.1.3.5	Research Methods and Keywords	1 day	Tue 2/10/15	Tue 2/10/15
1.1.3.6	Create Prelim research methods	1 day	Wed 2/11/15	Wed 2/11/15
1.1.3.7	Assign Student Advisory Committee	1.38 days	Mon 2/16/15	Tue 2/17/15
1.1.3.7.1	Meet with Advisory Committee to discuss communication style	1 day	Mon 2/16/15	Mon 2/16/15
1.1.3.7.2	Discuss and sign expectations contract	0.38 days	Mon 2/16/15	Tue 2/17/15
1.1.3.8	PPM#2 Deliverables Due	0 days	Fri 2/20/15	Fri 2/20/15

1.1.3.9	SAC PPM#2 Review	1 day	Thu 3/5/15	Thu 3/5/15
1.1.3.10	Risk Response - Deliverables not approved/Need improvement - Redraft and Resubmit	1 day	Fri 3/6/15	Fri 3/6/15
1.1.4	PPM#3	12.5 days	Fri 2/27/15	Tue 3/17/15
1.1.4.1	Complete Draft of PMP	1.59 days	Fri 2/27/15	Mon 3/2/15
1.1.4.2	Draft Description of expected research methods	1 day	Mon 3/2/15	Tue 3/3/15
1.1.4.3	Description of expected products/outcomes of the projects	1 day	Tue 3/3/15	Wed 3/4/15
1.1.4.4	Update Gantt Chart	2 days	Wed 3/4/15	Fri 3/6/15
1.1.4.5	Update Knowledge Areas Demonstration of mastery	1 day	Wed 3/4/15	Thu 3/5/15
1.1.4.6	PPM#3 Deliverables Due	0 days	Fri 3/13/15	Fri 3/13/15
1.1.4.7	SAC PPM#3 Review	0.5 days	Fri 3/13/15	Fri 3/13/15
1.1.4.8	Go/No Go Decision #1	0 days	Fri 3/13/15	Fri 3/13/15
1.1.4.9	Risk Response - Deliverables not approved/need improvement. Redraft and resubmit	2 days	Fri 3/13/15	Tue 3/17/15
1.1.5	PPM#4	20.5 days	Fri 3/13/15	Fri 4/10/15
1.1.5.1	Advisor - Approved Research instruments and analysis methodology	0.25 days	Fri 3/13/15	Fri 3/13/15
1.1.5.2	Approval Email from Advisory Committee	0.13 days	Fri 3/13/15	Fri 3/13/15
1.1.5.3	UAA IRB Submittal complete by March 27th	0 days	Fri 3/27/15	Fri 3/27/15
1.1.5.4	Prepare Professional Presentation of Project Objectives, Charter, PMP, and Deliverables	1 day	Tue 3/17/15	Wed 3/18/15
1.1.5.5	Professional Presentation of project objectives, charter, PMP, and Deliverables	0.5 days	Mon 3/30/15	Mon 3/30/15
1.1.5.6	Final PMP	0.5 days	Mon 3/30/15	Mon 3/30/15
1.1.5.7	Refined description of deliverables	0.13 days	Tue 3/31/15	Tue 3/31/15
1.1.5.8	Update on Knowledge areas applied	0.13 days	Tue 3/31/15	Tue 3/31/15
1.1.5.9	Updated Gantt Chart	0.13 days	Tue 3/31/15	Tue 3/31/15
1.1.5.10	PPM#4 Deliverables Due	0.5 days	Fri 4/10/15	Fri 4/10/15
1.1.6	686A Closeout	6 days	Mon 4/20/15	Tue 4/28/15
1.1.6.1	Final Presentation	0.13 days	Mon 4/20/15	Mon 4/20/15
1.1.6.2	Final PMP and refined Project Research and deliverables, Final Presentation Slides	0.5 days	Mon 4/20/15	Mon 4/20/15
1.1.6.3	Narrative of Lessons learned	0.5 days	Mon 4/20/15	Tue 4/21/15
1.1.6.4	Narrative on Knowledge Areas	0.5 days	Tue 4/21/15	Tue 4/21/15
1.1.6.5	Final Deliverables	0.5 days	Tue 4/21/15	Wed 4/22/15
1.1.6.6	Assessment of effective course leadership and Stakeholder Management	0.13 days	Wed 4/22/15	Wed 4/22/15
1.1.6.7	Final 686A Deliverables Due	0 days	Tue 4/28/15	Tue 4/28/15
1.2	Execution	87 days	Mon 6/1/15	Wed 9/30/15
1.2.1	Literature Review - PPM#1	21 days	Mon 6/1/15	Tue 6/30/15
1.2.1.1	Collect Literature	5 days	Mon 6/1/15	Fri 6/5/15
1.2.1.2	Gather Database Data on Shareholders	1 day	Mon 6/8/15	Mon 6/8/15
1.2.1.3	Analyze Data	3 days	Tue 6/9/15	Thu 6/11/15
1.2.1.4	Update Knowledge Areas	0.5 days	Fri 6/12/15	Fri 6/12/15
1.2.1.5	Final GSP	0.5 days	Fri 6/12/15	Fri 6/12/15
1.2.1.6	Update SAC	0.5 days	Mon 6/15/15	Mon 6/15/15
1.2.1.7	Data Collection Complete	0 days	Tue 6/30/15	Tue 6/30/15
1.2.2	PMP Feasibility Study - PPM#1	2 days	Mon 8/24/15	Tue 8/25/15
1.2.2.1	Start of 686B	0 days	Mon 8/24/15	Mon 8/24/15
1.2.2.2	Change Control Process, Project Progress method and status (EVM, other)	0.5 days	Mon 8/24/15	Mon 8/24/15
1.2.2.3	PMP Updates	0.5 days	Mon 8/24/15	Mon 8/24/15

1.2.2.4	Risk Response Implementation	0.5 days	Tue 8/25/15	Tue 8/25/15
1.2.2.5	Project deliverables status update	0.5 days	Tue 8/25/15	Tue 8/25/15
1.2.3	Product Development - PPM#2	25 days	Wed 8/26/15	Wed 9/30/15
1.2.3.1	Update abstract, TOC, research sources, key words	1 day	Wed 8/26/15	Wed 8/26/15
1.2.3.2	Validated research analysis - Needs Advisor analysis	0.5 days	Thu 8/27/15	Thu 8/27/15
1.2.3.3	Project progress status - Complete CMF Product	3 days	Thu 8/27/15	Tue 9/1/15
1.2.3.4	Legal/Finance Review	0.06 days	Tue 9/1/15	Tue 9/1/15
1.2.3.5	PMP update	1 day	Tue 9/1/15	Wed 9/2/15
1.2.3.6	Risk Response Implementation	1 day	Wed 9/2/15	Thu 9/3/15
1.2.3.7	Project Deliverables Status Update	1 day	Thu 9/3/15	Fri 9/4/15
1.2.3.8	Product Development Complete	0 days	Wed 9/30/15	Wed 9/30/15
1.2.4	Research Paper PPM#3	10 days	Fri 9/4/15	Fri 9/18/15
1.2.4.1	Working Draft of complete and properly formatted paper	5 days	Fri 9/4/15	Fri 9/11/15
1.2.4.2	Revised abstract	0.5 days	Fri 9/11/15	Mon 9/14/15
1.2.4.3	research results and analysis	2 days	Mon 9/14/15	Wed 9/16/15
1.2.4.4	Prelim conclusions and project deliverables	2 days	Wed 9/16/15	Fri 9/18/15
1.2.4.5	Updated Project Schedule	0.5 days	Fri 9/18/15	Fri 9/18/15
1.3	Closing	237 days	Fri 1/16/15	Tue 12/15/15
1.3.1	Final Presentation Prep	1 day	Fri 1/16/15	Fri 1/16/15
1.3.2	Final Presentation	0 days	Fri 9/18/15	Fri 9/18/15
1.3.3	Complete Final CMF Product	2 days	Fri 9/18/15	Tue 9/22/15
1.3.4	Complete research paper	2 days	Tue 9/22/15	Thu 9/24/15
1.3.5	Complete Closeout Checklist	1 day	Thu 9/24/15	Fri 9/25/15
1.3.6	Extract Lessons Learned	0.5 days	Fri 9/25/15	Mon 9/28/15
1.3.7	Sponsor Signs Forms	0.5 days	Mon 9/28/15	Mon 9/28/15
1.3.8	Prepare and submit final project deliverables	1 day	Mon 9/28/15	Tue 9/29/15
1.3.9	Final Product and Research Paper submitted - Project Complete	0 days	Tue 12/15/15	Tue 12/15/15

2 SCOPE MANAGEMENT PLAN

2.1 PURPOSE

The Scope Management Plan has the following purposes:

- Ensures that the project includes all of the work required, and only the work required to complete the project successfully.
- Documents how the project scope will be defined, developed and verified/controlled.
- Provides framework in creating and defining the Work Breakdown Structure to certain detail.
- Ensure project requirements are met, managed, and controlled.

2.2 WORK BREAKDOWN STRUCTURE (WBS) DIAGRAM

The WBS is used to decompose all the work of the project and is populated by the Project Manager. It begins at the project level and is successively broken down into finer levels of detail. The lowest level is a work package. The final WBS is divided into three phases, Planning, Executing, and Closing. Any work that is not part of the schedule and WBS will be considered out of scope and removed from the project. Any changes to the WBS must go through the change management process described in the Change Management Plan. The final WBS for this project can be found in the appendices.

2.3 CHANGES TO SCOPE

Modifications to scope are conducted according to a formal change process described in the Change Management Plan.

2.4 REQUIREMENTS TRACEABILITY MATRIX

Stakeholder requirements are documented, tracked, and monitored in the Requirements Traceability Matrix. The matrix includes lists all stakeholders, their requirements for the project, the acceptance criteria for each requirement, and a WBS reference number on where the requirement is met. Changes to the Requirements Traceability Matrix must go through the change management process described in the Change Management Plan. The final Requirements Traceability Matrix can be found in the appendices.

3 SCHEDULE MANAGEMENT PLAN

3.1 PURPOSE

The Schedule Management Plan has the following purposes:

- To present the schedule of the project.
- To describe schedule and Gantt chart reporting details.
- To describe procedures that will be used to deal with schedule changes and slippages.
- To describe procedures that will be used to implement resolutions to schedule variances.

3.2 PROJECT SCHEDULE AND GANTT CHART

The Project Manager is responsible for monitoring and updating tasks in Microsoft Project schedule and Gantt chart. The Project Manager will provide an updated Project Schedule and Gantt chart at every PPM deadline. Any changes in schedule must go through the change management process described in the Change Management Process. A complete project schedule can be found in the Project Scope. A complete Gantt Chart can be found in the appendices.

3.3 IDENTIFYING SLIPPAGES

To identify slippage and schedule changes the Project Manager will monitor and evaluate the schedule throughout the project lifecycle to identify the following:

- Schedule Slippages.
- Issues that may adversely affect the schedule.
- Trends leading to a possible slippage.
- Milestone completion. See Project Scope for full milestone list.
- See Scope for full project schedule.

3.4 RESOLUTION OF SCHEDULE VARIANCES

In case of schedule variance, the Project Manager will take the following actions as necessary.

- Accept the slippage - The schedule slippage that affects delivery of PPM's will be reviewed by SAC members.
- Resolve the slippage - The schedule slippage will be resolved by schedule crashing.

- Reduce the scope - The Project Manager will consult sponsor and get verbal confirmation to reduce scope of the product. Changes to Project Scope must go through the change management process described in the Change Management Plan.

4 HUMAN RESOURCES MANAGEMENT PLAN

This document describes the processes and procedures used to staff the project. This plan supplements the overall Project Management Plan (PMP) and covers the staffing requirements for the project. The Staffing Management Plan is intended to be a living document, reviewed at least annually and updated as needed.

The intended audience for the Staffing Management Plan is all project stakeholders, including the project sponsor, SAC, and the project team.

4.1 ROLES AND RESPONSIBILITIES

The roles and responsibilities for the Project are essential to project success. All team members must clearly understand their roles and responsibilities in order to successfully perform their portion of the project. The following project team roles and responsibilities have been established:

4.1.1 PROJECT MANAGER:

- The Project Manager must interface with management as requested, delegate responsibilities within the framework of the project, and communicate with management and CMF Board Members as required, to ensure successful and timely completion of the project.
- The Project Manager is responsible for developing a project plan that describes the objectives, deliverables, and implementation plan for the project.
- The Project Manager must execute the project plan, monitor progress and performance, and take corrective action if necessary.
- The Project Manager will communicate assignments to functional managers and the members of the project team.
- The Project Manager will identify and resolve communication issues.
- The Project Manager will complete work per syllabus and incorporate feedback from SAC members and other Stakeholders.
- The Project Manager must possess the following skills: leadership/management, budgeting, scheduling, and effective communication.

4.1.2 STUDENT ADVISORY COMMITTEE (SAC)

- Provide feedback via replies directly to Blackboard postings or other methods.
- Clarify communication and feedback expectations with Project Manager at the beginning of the semester.
- Sign "Expectations Contract".
- Provide feedback on PPM's on a timely basis.
- Attend Final Presentation.
- Coordinate with other SAC Members to grade PPMs.

4.1.3 SPONSOR REVIEW

- Will set aside time to review Financial Analysis and Sustainability Plan and provide feedback in a timely manner.

4.2 STAFF REQUIRED

Below is the staff required for the Phase I of this project. Team Member and Legal/Finance do not become active until Phase II of the project.

RESOURCE NAME	START	FINISH
ANGELA TOTEMOFF PROJECT MANAGER	1/16/15	4/10/15
SPONSOR	1/20/15	4/10/15
SAC PRIMARY	1/30/15	4/10/15
SAC MEMBER 2	1/30/15	4/10/15
SAC MEMBER 3	1/30/15	4/10/15
TEAM MEMBER	6/1/15	6/30/15
LEGAL/FINANCE	9/1/15	9/1/15

4.3 RACI CHART

RACI chart shows the relationship between project tasks and team members. A full RACI Chart can be found in the appendices.

5 COMMUNICATIONS MANAGEMENT PLAN

5.1 PURPOSE

- Promote the success of a project by meeting the information needs of project stakeholders and outline the goals of the communications efforts to reach and inform each group.
- Define the project's structure and methods of information collection, screening, formatting, and distribution of project information.
- Describe the planned and periodic communications occurring between all the project stakeholders.

5.2 COMMUNICATION PREFERENCE

ID	Internal/ External	Stakeholder	Communication Style
1	External	CMF Board Members	All communication to the CMF Board about this project will go through Sheri Buretta unless otherwise stated by her. She is busy; thoughts, ideas and possible solutions must be formulated prior to meeting for quick resolution. Email approvals. Phone calls if discussion is needed. Short meetings at board members office if discussions are longer.
2	External	TTC Assistant Controller	Email, short meetings when needed.
3	External	TTC VP of Finance	Email, short meetings when needed.
4	Internal	Project Manger	Emails for approval documentation, Phone calls for quick responses, In person meetings for long discussions with approvals for 3 or more action items.
5	External	Team Member 1 (Michelle)	Email, daily check ins.
6	Internal	Student Advisory Committee	See Expectations Contract.
7	External	OSIYO	Email
8	External	CMF Program Recipients	Phone calls

5.3 COMMUNICATIONS MATRIX

ID	Communication	Description	Frequency	Format	Recipient/Attendees	WBS
1	Internal Status Report	Internal status reports for the advisory Board	Every class session	Dashboard written report. 3 minute briefing	SAC, 686B Students	1.1.2.10 1.1.3.9 1.1.4.7 1.1.5.10
2	Internal Progress Reports	Written project progress report that includes KPI's.	Due at every PPM due date	Written Report	SAC	1.1.2.9 1.1.3.8 1.1.4.6 1.1.5.9
2	Consultations with SAC	Support the project	Once before PPM's are	Meetings	Roger Hull, LuAnn Piccard	1.1.2.9 1.1.3.8

		progress, clarify requirements, discuss best practices	due			1.1.4.6 1.1.5.9
3	Product Review	Review and approve product	Once during the Legal and Finance Review	Meeting	Sheri Buretta	1.2.3.4

5.4 STATUS DASHBOARD REPORTS

Status reports will be provided during each class session that include a Synopsis of Project, Progress Since Last Report, Current Status, Forecast, Anticipated Changes/Key Risks/Corrective Actions, and Key Takeaways/Where Help Needed.

5.5 PROJECT PROGRESS REPORTS

Progress Reports will be provided with every PPM submission and will contain the following updates:

- Schedule Variance Index (SPI)
- Cost Performance Index (CPI)
- Cumulative Cost Curve, Planned value (PV)
- Actual Cost Curve (AC)
- Earned Value Curve (EV)
- Milestones Met
- Risk realization report
- Change Log
- Work planned for next week
- Knowledge Area Application Update

6 STAKEHOLDER MANAGEMENT PLAN

6.1 PURPOSE

The Stakeholder Management Plan has the following purposes:

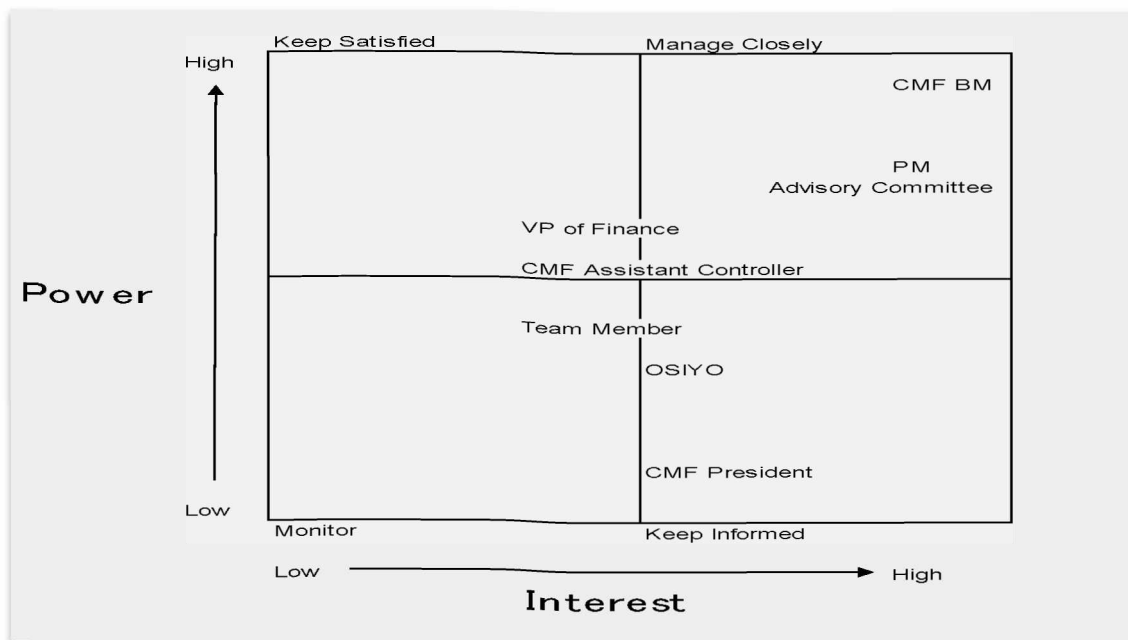
- Identify and categorize stakeholders that could affect or be affected by the project.
- Analyze stakeholder expectations and their impact on the project.

6.2 STAKEHOLDER IDENTIFICATION

The following stakeholders were identified analyzed for this project. Please see Appendix H

STAKEHOLDER	INTERNAL/ EXTERNAL	IMPACT	INFLU ENCE	ORG	CONTACT INFORMA TION	INTEREST IN PROJECT
CMF BOARD MEMBERS	Internal	5	5	CMF	278 4000	Owners of CMF
CMF PRESIDENT	Internal	1	2	CMF	278 4000	Provides Legal Advice
TTC ASSISTANT CONTROLLER	Internal	3	3	TTC	278 4000	Tracts CMF Financials
TTC VP OF FINANCE	Internal	3	3	TTC	278 4000	Tracts CMF Financial Audits
PROJECT MANGER	Internal	5	3	TTC	278 4000	Directs CMF Programs
TEAM MEMBER 1 (MICHELLE)	Internal	3	1	TTC	278 4000	Runs CMF Programs
STUDENT ADVISORY COMMITTEE	External	4	4	UAA	279 1924	UAA Course Professors
LEIGH MCGEE	External	2	4	OSIYO		CMF Organizational Consultant
CMF PROGRAM RECIPIENTS	External	5	2	Public	N/A	Receives Financial Assistance from CMF

6.3 POWER/INTEREST GRID



6.4 STAKEHOLDER REQUIREMENTS

Stakeholder requirements can be found in the Requirements Traceability Matrix, located in the appendices.

6.5 STAKEHOLDER COMMUNICATIONS

Stakeholder communication can be found in the Communications Management Plan.

7 RISK MANAGEMENT PLAN

7.1 PURPOSE

The Risk Management Plan purposes are below:

- Describes the approach for managing uncertainty, both threats and opportunities, for the project.
- Identify Risks and Opportunities of the project.
- Identify triggers, weight and impacts of risks.
- Develop response measures for risks.

7.2 RISK REGISTER

The Risk Register is used to track information about identified risks over the course of the project. See appendices for full risk register.

7.3 RISK REALIZATION LOG

As risks occur they will be documented in the log below and presented in each progress report.

Date	Trigger/Event	Known/Unknown	Impact	Scope Change

8 CHANGE MANAGEMENT PLAN

8.1 PURPOSE

The Change Management Plan documents and tracks the necessary information required to effectively manage project change from project inception to delivery. Its intended audience is the Project Manager, project team, project sponsor and any senior leaders whose support is needed to carry out the plan.

Change Management process establishes an orderly and effective procedure for tracking the submission, coordination, review, evaluation, and approval for release of all changes to the project's baselines.

8.2 CHANGE MANAGEMENT PROCESS



STEP	DESCRIPTION
GENERATE CHANGE REQUEST FORM (CR FORM)	Potential changes to project scope will be vetted by the Project Manager Angela Totemoff.
EVALUATE CR (IMPACT ANALYSIS)	If the Project Manager determines the change is worth further investigation, a schedule impact analysis will be done in Microsoft Project to ensure no deadlines will be missed due to the requested change.
AUTHORIZE (APPROVE OR DENY)	If the change doesn't affect time constraints it will be incorporated into the project plan.
IMPLEMENT	Change will be implemented and appropriate adjustments to Microsoft Project will be made.
LOG CR STATUS	The Change Manager enters the CR into the CR Log. The CR's status is updated throughout the CR process as needed

See Appendices for Change Log and Change Request Form.

9 METRICS MANAGEMENT PLAN

9.1 KEY PERFORMANCE INDICATORS

Measuring KPI's will help the Project Manager track progress of the project and respond accordingly should changes in cost, schedule, or scope occur. Project Status Reports will be provided every three weeks with the KPI's below.

KEY PERFORMANCE INDICATORS	THRESHOLDS	ACTION/NOTES
SCHEDULE VARIANCE INDEX (SPI)	<0.75 >1.25	Review Schedule Management Plan to find source of slippage and possible solution
COST PERFORMANCE INDEX (CPI)	<0.75 >1.25	Review scope/schedule to ensure there are no slippages or delays.
PLANNED VALUE (PV) ACTUAL COST CURVE (AC) EARNED VALUE CURVE (EV)	Use Cumulative Cost Curve to identify trends.	
TASKS COMPLETED WORK PLANNED FOR NEXT WEEK	Ensures scheduled is monitored.	
KNOWLEDGE AREA APPLICATION UPDATE RISK REALIZATION CHANGE LOG	Demonstrates Project Management Mastery Ensures documentation is up to date.	

10 KNOWLEDGE AREA SELECTION

The purpose of the Knowledge Area Selection is to define what project management area the Project Manager will focus on, how it will be applied, the tools of application and how the demonstration will be assessed. Scope Management, Schedule Management, and Stakeholder Management will be the applied to this project.

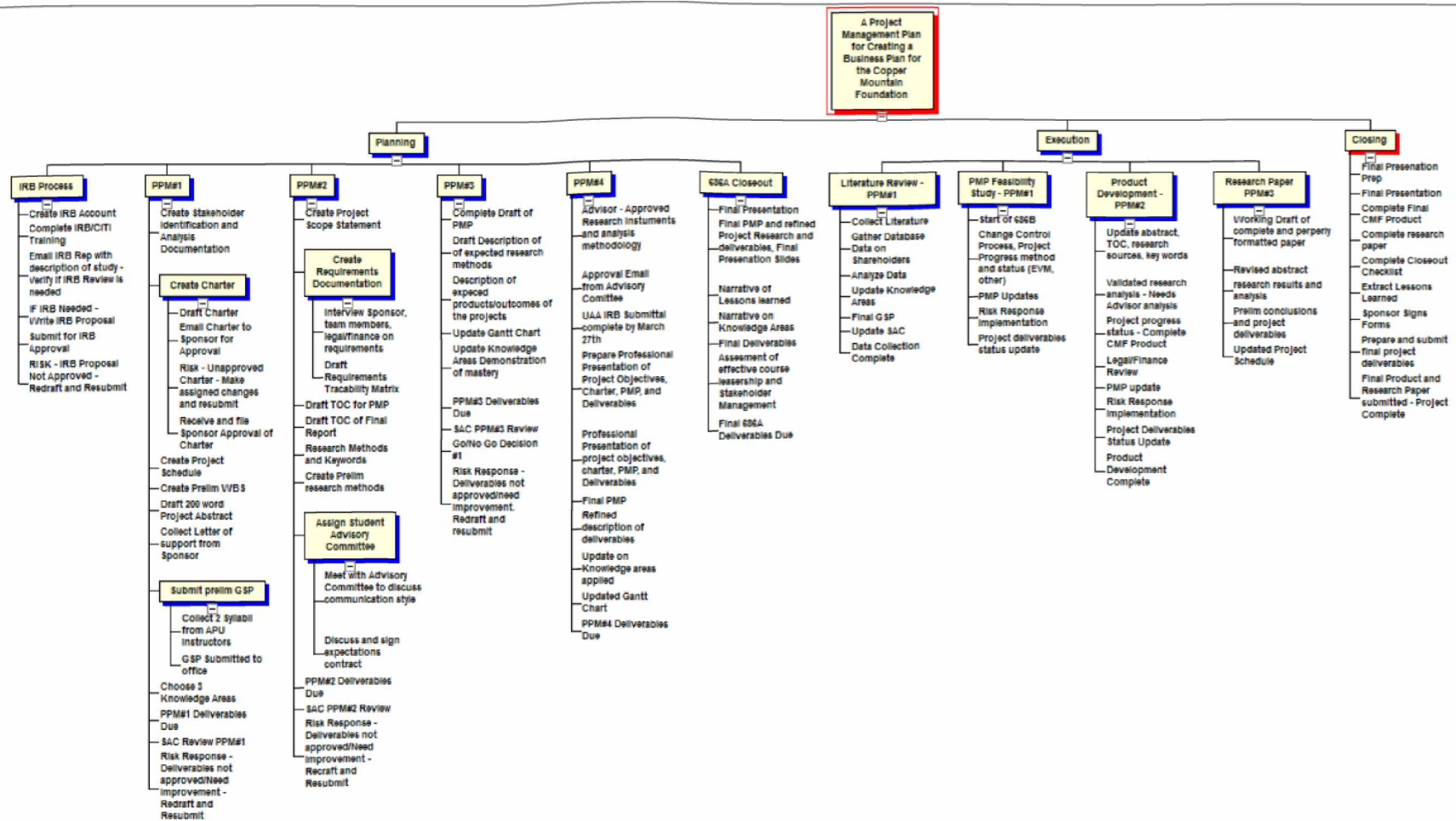
Area	Focus	Application	Tools	Assessment
Scope Management	Change Management	This project must include all of the work and only the work. A Project Manager must be able to engage stakeholders to collect requirements from stakeholders. Additionally, when a project is planned and executed it goes through progressive elaboration. There is a certain level of uncertainty that can occur with every project. With that being said, the Project Manager must be able to capture and analyze changes as the project progresses through the life cycle, to determine if the change is justified or an instance of scope creep. This plan will utilize the Scope Management Plan, and Change Management Plan to define, validate and control changes as they occur to the project.	<ul style="list-style-type: none"> - Change Request Log - Change Log - Requirements Traceability Matrix 	Mastery will be demonstrated by creating and updating the Requirements Traceability Matrix, showing the utilization of the change request form and the change log. The change log will be provided with each PPM with the Project Progress Report.
Schedule Management	Controls	The purpose of schedule management is to develop, monitor, and control the schedule. This ensures that all of the work is being completed, and also analyzes and controls the effects of any risk occurrences that may have an effect on the project schedule. This project is has a hard time constraint and must be completed within two semesters to avoid course deferment. The Project Manager will utilize the Schedule Management Plan, the Risk Management Plan, Metrics Management Plan, and Change Management Plan to monitor and control the schedule to ensure deliverables are submitted on time.	<ul style="list-style-type: none"> - Updated MS Project Schedule - Project Progress Report 	Mastery will be demonstrated by showing the utilization of the MS Project Gantt Chart, the Progress Report that includes the risk realization report, and KPI's including schedule, and on-time submissions of PPM's.
Stakeholder Management	Communication	Engaging stakeholders to provide input and keep them updated is vital to the success of the project. Communication management involves planning for all of the communication with project stakeholders. It identifies the frequency and types of information required by the stakeholders. This project has important stakeholders from two difference organizations. It is important to engage those stakeholders in an appropriate way to meet their needs. The Project Manager will utilize the Stakeholder Management Plan and the Communications Management plan to effectively engage and communicate with the stakeholders.	<ul style="list-style-type: none"> - Expectation's Contract - Stakeholder Identification - Stakeholder Communication Preference Sheet - Communication Matrix 	Mastery will be demonstrated by successful communication with SAC and Sponsor that was established in the Expectations Contract and with as needed communication with the sponsor.

11 APPENDICES

Order of appendices:

- 11.1 Work Breakdown Structure
- 11.2 Stakeholder Register
- 11.3 Requirements Traceability Matrix
- 11.4 Risk Register
- 11.5 RACI Chart
- 11.6 Change Request Form
- 11.7 Change Request Log
- 11.8 Abstract
- 11.9 Project Charter
- 11.10 Research Sources, Methods, Instruments
- 11.11 IRB Approval Documentation

11.1 WORK BREAKDOWN STRUCTURE



11.2 STAKEHOLDER REGISTER

ID	Internal/ External	Stakeholder	Impact	Influence	Risk Tolerance	Responsibility	Needs	Communication Style
1	Internal	CMF Board Members	5	5	Low	Review and approve project deliverables. Open opportunities if none present themselves to PM. Provide input and direction to PM when needed.	Progress Reports every three weeks. Assurance that Financial analysis sharing is secure	Sheri Buretta is the CMF Board Member representative. She will provide guidance, approvals, and input on behalf of the board. All communication to the CMF Board about this project will go through her unless otherwise stated by her. She is busy; thoughts, ideas and possible solutions must be formulated prior to meeting for quick resolution. Email approvals. Phone calls if discussion is needed. Short meetings at board members office if discussions are longer.
2	Internal	CMF President	1	2	Low	Offer Legal advice when needed	To review final project before adoption by the CMF Board	Email. Limited Communication. Do not ask for approvals. Keep questions limited to legal advice
	Internal	TTC Assistant Controller	3	3	Low	Manages CMF's Financials	Clear, documented communication. Assurance that financial analysis sharing is secure.	Email, short meetings when needed.
	Internal	TTC VP of Finance	3	3	LOW	TTC, VP of Finance	High level overview of tasks involving use of financial information. Assurance that Financial analysis sharing is secure. Needs to be aware of any Financial Conflict and solutions that were formulated	Email, short meetings when needed.

3	Internal	Project Manger	5	3	Low	Develop PMP, Assign Resources, Execute PMP, Manage Communications with stakeholders	Approval from Project Sponsor, Input from Accounting Department, weekly check- ins with Advisory Committee	Emails for approval documentation, Phone calls for quick responses, In person meetings for long discussions with approvals for 3 or more action items.
4	Internal	Team Member 1 (Michelle)	3	1	Low	Assist PM in research. Assist PM with sections of technical writing	Clear, concise action items with timeline for delivery. Work schedule flexibility for health concerns	Email, daily check ins.
5	External	Student Advisory Committee	4	4	Low	Observe PM and provide score for Stakeholder Management and Communication.	Expectations Contract mapped out in agreement	See Expectations Contract.
6	External	OSIYO	2	4	Low	Organizational Development Consultant that helps assist with 12 month action plan	See final business development plan	Email
7	External	CMF Program Recipients	5	2	Low	Provide Feedback about programs and services	Fast response time to application requests. No decrease in funding	Phone calls

11.3 REQUIREMENTS TRACEABILITY MATRIX

Stakeholder Acceptance	ID	Requirement	Acceptance Criteria	Responsible	WBS Reference
CMF Board Members	1	<ul style="list-style-type: none"> The final Financial Analysis and Sustainability Plan is within all legal guidelines for 501c3 organizations 	<ul style="list-style-type: none"> Final Legal and Board Review 	PM	1.2.3.4
	2	<ul style="list-style-type: none"> Within a budget or can be easily adjusted to fit with in another budget. 			1.2.3.4
	3	<ul style="list-style-type: none"> Can be accomplished within 12 months 			1.2.3.4
CMF President	4	<ul style="list-style-type: none"> The final Financial Analysis and Sustainability Plan is within all legal guidelines for 501c3 organizations 	<ul style="list-style-type: none"> Final Legal Review Meeting 	PM/CMF President	1.2.3.4
TTC Assistant Controller	5	<ul style="list-style-type: none"> Financial Analysis and Sustainability Plan doesn't violate any existing policies or procedures. 	<ul style="list-style-type: none"> Passes Legal/Financial Review 	PM/TTC Controller/VP of Finance	1.2.3.4
TTC VP of Finance	6	<ul style="list-style-type: none"> Financial Analysis and Sustainability Plan doesn't violate any existing policies or procedures. 	<ul style="list-style-type: none"> Passes Legal/Financial Review 	PM/TTC Controller/VP of Finance	1.2.3.4
	7	<ul style="list-style-type: none"> The final Financial Analysis and Sustainability Plan is within all legal guidelines for 501c3 organizations 			1.2.3.4
Project Manger	8	<ul style="list-style-type: none"> Complete all deliverables as assigned by Advisory Committee 	<ul style="list-style-type: none"> PPM Turned in on Blackboard 	PM	1.1.2.10
	9	<ul style="list-style-type: none"> Feedback From all Advisory Committee Members 	<ul style="list-style-type: none"> Time to review PPM 	Advisory Committee	1.1.3.9 1.1.4.7 1.1.5.10
Team Member 1 (Michelle)	10	<ul style="list-style-type: none"> Research Tasks clear and concise 	<ul style="list-style-type: none"> Research turned in 	PM	
Student Advisory Committee	11	<ul style="list-style-type: none"> IRB Submittal 	<ul style="list-style-type: none"> IRB Approval 	PM	
	12	<ul style="list-style-type: none"> PPM Deliverables 	<ul style="list-style-type: none"> Turned into Blackboard 	PM	1.1.2.10
	13	<ul style="list-style-type: none"> Established Communication Plan 	<ul style="list-style-type: none"> Expectations Contract 	PM	1.1.3.9
	14			PM	1.1.4.7
	15			PM	1.1.5.10
	16			PM	
OSIYO	17	<ul style="list-style-type: none"> Final Financial Analysis and Sustainability Plan is in line with the TTC Strategic plan and CMF Strategic Plan 	<ul style="list-style-type: none"> Final Board Review 	PM	1.2.3.4

11.4 RISK REGISTER

Risk Identification			Qualitative Rating			WBS	Risk Solutions			
ID#	Risk	Risk Category	Prob	Impact	Risk Score	WBS No. Effected	Risk Mitigation	Risk Response	Trigger	Risk Owner
1	IRB - Unclear understanding of the IRB process that delays the proposal submission	Schedule	50%	10 days	5 Days	1.1.1.4, 1.1.5.3	Attend IRB Review Class session, Complete IRB Training	Meet with SAC Members and IRB Personnel to get more understanding	By PPM#2 deadline, unable to articulate the IRB process	PM
2	IRB - Proposal rejected causing a severe delay in resubmission	Schedule	25%	20 days	10 Days	1.1.5.3, 1.1.5.2, 1.1.5.6	Submit pre-review email to IRB Personnel to get feedback, include in MS Schedule	Meet with SAC Members and IRB Personnel to get try to expedite 2nd review process. Add risk response time into plan	IRB Proposal Rejected	PM
3	Lack of understanding of the Final Report that causes delays and poor quality of PPM Submission	Schedule, Quality	50%	8 hrs	4 hrs	1.1.3.4	Discuss during PPM Review Tasks	Add additional PM time to task. Meet with SAC Members to clarify understanding	By PPM#2, unable to articulate the Final Report	PM
4	Lack of understanding of the Literature Review, Research Methods, Sources, and Instruments	Schedule, Quality	50%	8 hrs	4 hrs	1.1.3.5, 1.1.3.6	Discuss during PPM Review Tasks	Add additional PM time to task. Meet with SAC Members to clarify understanding	By PPM#2, unable to articulate PPM Deliverables	PM
5	Sponsor does not have time to review and approve Project Documents, making PPM's submission incomplete	Schedule	10%	15 days	1.5 days	1.1.2.2.2	Add in response time to MS Schedule	Contact Sponsor via email to get a faster response. Add Risk Response time into plan	Charter Approvals late	PM
6	Project is not supported by Copper Mountain Foundation Board of Directors, making the project irrelevant, adding additional time to reevaluate project purpose	Quality	5%	20 days	1 day	1.1.3.2.1, 1.1.5.6	Schedule Stakeholder Requirements Meeting to discuss project purpose and requirements	Meet with Internal Stakeholders to discuss requirements to ensure project is relevant and useful.	By PPM#1 Charter Not Approved	PM
7	Student Advisory Committee does not provide feedback for every PPM, adding additional time with lessor quality of PPM submissions.	Schedule, Quality	1%	5 days	.05 days	1.1.2.10, 1.1.3.9, 1.1.4.7, 1.1.5.1	Remind SAC Members about the deadline	Ask for Feedback within a timely manner	By one week before next PPM is due, feedback is not provided	SAC

8	PM does not have access to Microsoft Project, WBS Chart Pro, Blackboard, Excel, adding additional time with lessor quality of PPM Submissions.	Schedule, Quality	1%	5 days	.05 days	1.1.2.3, 1.1.2.4	Download MS Project, WBS Chart Pro at MSPM office.	Download MS Project, WBS Chart Pro at MSPM office.	By Start of PM686A, PM does not have required software applications	PM
9	Loss of backup	Schedule	50%	4 days	2 days	All	Daily back ups	Get previous work submitted on black board and recreate work	Loss of data or denied access from data.	PM
10	Rework of PPM Submission	Schedule	75%	4 days	3 days	1.1.2.10, 1.1.3.9, 1.1.4.7, 1.1.5.1	Submit PPM early and get feedback to incorporate	Add additional hours to make up work.	Bad score on PPM.	PM


11.5 RACI CHART

Responsible Accountable Consult Inform		Key: PM – Project Manager SAC – Student Advisory Committee S - Sponsor TM - Team Member LF – Legal and Finance				
		PM	SAC	S	TM	LF
1	A Project Management Plan for Creating a Financial Analysis and Sustainability Plan for the Copper Mountain Foundation					
1.1	Planning					
1.1.1	IRB Process					
1.1.1.1	Create IRB Account	R	I			
1.1.1.2	Complete IRB/CITI Training	R	I			
1.1.1.3	Email IRB Rep with description of study - Verify if IRB Review is needed	R	I			
1.1.1.4	IF IRB Needed – Write IRB Proposal	R	I			
1.1.1.5	Submit for IRB Approval	R	I			
1.1.1.6	RISK – IRB Proposal Not Approved – Redraft and Resubmit	R	I			
1.1.2	PPM#1					
1.1.2.1	Create Stakeholder Identification and Analysis Documentation	R	I	I		
1.1.2.2	Create Charter					
1.1.2.2.1	Draft Charter	R	I	I		
1.1.2.2.2	Email Charter to Sponsor for Approval	R	I	A		
1.1.2.2.3	Risk - Unapproved Charter - Make assigned changes and resubmit	R	I	A		
1.1.2.2.4	Receive and file Sponsor Approval of Charter	R	I	I		
1.1.2.3	Create Project Schedule	R	I			
1.1.2.4	Create Prelim WBS	R	I			
1.1.2.5	Draft 200 word Project Abstract	R	I			
1.1.2.6	Collect Letter of support from Sponsor	R	I	C		
1.1.2.7	Submit prelim GSP					
1.1.2.7.1	Collect 2 Syllabi from APU Instructors	R	I			
1.1.2.7.2	GSP Submitted to office	R	I			
1.1.2.8	Choose 3 Knowledge Areas	R	C			
1.1.2.9	PPM#1 Deliverables Due	R	I			
1.1.2.10	SAC Review PPM#1	R	A			
1.1.2.11	Risk Response - Deliverables not approved/Need Improvement - Redraft and Resubmit	R	I			
1.1.3	PPM#2					
1.1.3.1	Create Project Scope Statement	R	I			
1.1.3.2	Create Requirements Documentation					
1.1.3.2.1	Interview Sponsor, team members, legal/finance on requirements	A	I			
1.1.3.2.2	Draft Requirements Traceability Matrix	R	I	C		


1.1.3.3	Draft TOC for PMP	R	I			
1.1.3.4	Draft TOC of Final Report	R	I			
1.1.3.5	Research Methods and Keywords	R	C			
1.1.3.6	Create Prelim research methods	R	I			
1.1.3.7	Assign Student Advisory Committee					
1.1.3.7.1	Meet with Advisory Committee to discuss communication style	R	A			
1.1.3.7.2	Discuss and sign expectations contract	R	A			
1.1.3.8	PPM#2 Deliverables Due	R	I			
1.1.3.9	SAC PPM#2 Review	R	I			
1.1.3.10	Risk Response - Deliverables not approved/Need improvement - Redraft and Resubmit	R	I			
1.1.4	PPM#3					
1.1.4.1	Complete Draft of PMP	R	I			
1.1.4.2	Draft Description of expected research methods	R	I			
1.1.4.3	Description of expected products/outcomes of the projects	R	I			
1.1.4.4	Update Gantt Chart	R	I			
1.1.4.5	Update Knowledge Areas Demonstration of mastery	R	I			
1.1.4.6	PPM#3 Deliverables Due	R	I			
1.1.4.7	SAC PPM#3 Review	R	I			
1.1.4.8	Go/No Go Decision #1	I	R			
1.1.4.9	Risk Response - Deliverables not approved/need improvement. Redraft and resubmit	R	I			
1.1.5	PPM#4					
1.1.5.1	Advisor - Approved Research instruments and analysis methodology	I	R			
1.1.5.2	Approval Email from Advisory Committee	R	A			
1.1.5.3	UAA IRB Submittal complete by March 27th	R	I			
1.1.5.4	Prepare Professional Presentation of Project Objectives, Charter, PMP, and Deliverables	R	I			
1.1.5.5	Professional Presentation of project objectives, charter, PMP, and Deliverables	R	I			
1.1.5.6	Final PMP	R	I			
1.1.5.7	Refined description of deliverables	R	I			
1.1.5.8	Update on Knowledge areas applied	R	I			
1.1.5.9	Updated Gantt Chart	R	I			
1.1.5.10	PPM#4 Deliverables Due	R	I			
1.1.6	686A Closeout					
1.1.6.1	Final Presentation	R	I			
1.1.6.2	Final PMP and refined Project Research and deliverables, Final Presentation Slides	R	I			
1.1.6.3	Narrative of Lessons learned	R	I			
1.1.6.4	Narrative on Knowledge Areas	R	I			
1.1.6.5	Final Deliverables	R	I			
1.1.6.6	Assessment of effective course leadership and Stakeholder Management	R	I			
1.1.6.7	Final 686A Deliverables Due	R	I			

1.2	Execution					
1.2.1	Literature Review - PPM#1					
1.2.1.1	Collect Literature	R	I		A	
1.2.1.2	Gather Database Data on Shareholders	R	I		A	
1.2.1.3	Analyze Data	R	I			
1.2.1.4	Update Knowledge Areas	R	I			
1.2.1.5	Final GSP	R	I			
1.2.1.6	Update SAC	R	I			
1.2.1.7	Data Collection Complete	R	I			
1.2.2	PMP Feasibility Study - PPM#1					
1.2.2.1	Start of 686B	A	R			
1.2.2.2	Change Control Process, Project Progress method and status (EVM, other)	R	I			
1.2.2.3	PMP Updates	R	I			
1.2.2.4	Risk Response Implementation	R	I			
1.2.2.5	Project deliverables status update	R	I			
1.2.3	Product Development - PPM#2					
1.2.3.1	Update abstract, TOC, research sources, key words	R	I			
1.2.3.2	Validated research analysis - Needs Advisor analysis	R	I			
1.2.3.3	Project progress status - Complete CMF Product	R	I			
1.2.3.4	Legal/Finance Review	R	I	A		A
1.2.3.5	PMP update	R	I			
1.2.3.6	Risk Response Implementation	R	I			
1.2.3.7	Project Deliverables Status Update	R	I			
1.2.3.8	Product Development Complete	R	I	I		
1.2.4	Research Paper PPM#3					
1.2.4.1	Working Draft of complete and properly formatted paper	R	I			
1.2.4.2	Revised abstract	R	I			
1.2.4.3	research results and analysis	R	I	I		
1.2.4.4	Prelim conclusions and project deliverables	R	I			
1.2.4.5	Updated Project Schedule	R	I			
1.3	Closing					
1.3.1	Final Presentation Prep	R	C			
1.3.2	Final Presentation	R	C	I		
1.3.3	Complete Final CMF Product	R	I			
1.3.4	Complete research paper	R	I			
1.3.5	Complete Closeout Checklist	R	I			
1.3.6	Extract Lessons Learned	R	C			
1.3.7	Sponsor Signs Forms	R	I	A		
1.3.8	Prepare and submit final project deliverables	R	I	I		
1.3.9	Final Product and Research Paper submitted - Project Complete	R	I			

11.6 CHANGE REQUEST FORM



CHANGE REQUEST 001



Project Title: _____

Date Prepared: _____

Person Requesting Change: _____

Change Number: _____

Category of Change:

☐ Scope

☐ Quality

☐ Requirements

☐ Cost

☐ Schedule

☐ Documents

Detailed Description of Proposed Change:

Justification for Proposed Change:

Impacts of Change:

Scope	<input type="checkbox"/> Increase	<input type="checkbox"/> Decrease	<input type="checkbox"/> Modify
Description:			
Quality	<input type="checkbox"/> Increase	<input type="checkbox"/> Decrease	<input type="checkbox"/> Modify
Description:			
Requirements	<input type="checkbox"/> Increase	<input type="checkbox"/> Decrease	<input type="checkbox"/> Modify
Description:			
Cost	<input type="checkbox"/> Increase	<input type="checkbox"/> Decrease	<input type="checkbox"/> Modify
Description: The costs would decrease by 25K			
Schedule	<input type="checkbox"/> Increase	<input type="checkbox"/> Decrease	<input type="checkbox"/> Modify
Description:			
Project Documents			

Comments:

Disposition

☐ Approve

☐ Reject

☐ Defer

☐ Modify

Justification:

11.7 CHANGE REQUEST LOG

WBS	Task Name	CR No.	Change Request	Date	Status
<WBS No.	<Task Name	<CR No.	<Detailed Description, addressing scope, time, schedule changes	<date	<Approved, Modified, Accepted

11.8 ABSTRACT

The Copper Mountain Foundation (CMF) is a 501 c3 non-profit that is fully funded, fully operated, and established by The Tatitlek Corporation (TTC). CMF currently has a program that provides scholarships and career grants for original enrollees and descendants original enrollees of the Tatitlek Corporation. The program is managed and operated by the TTC Shareholder Services Department.

To be eligible to receive funding, a student must be an original enrollee of The Tatitlek Corporation (TTC) or a lineal descendant of an original enrollee (by birth or adoption). Original enrollees of TTC either resided in the Native Village of Tatitlek or their families resided in Tatitlek at the time of enrollment in TTC. Today, scholarship applicants very often continue to come from a rural area within Alaska such as the Village of Tatitlek. The college graduate rate of rural students continues to be one of the lowest in the state. To address this problem, CMF created the scholarship program to offer financial assistance for education and career certificates for the enrollees.

The CMF Board of Directors has expressed interest in creating a Financial Analysis and Sustainability Plan to gain financial sustainability. The financial health of TTC has enabled the programs in CMF to be fully funded. However, securing additional funds diversifies CMF's financial portfolio making them more financially stable, securing scholarships and career grants for the shareholder and descendants of the TTC. The goal of financial sustainability ensures that the programs will continue at the same rate of funding.

The purpose of the Copper Mountain Project is to provide a robust Financial Analysis and Sustainability Plan. When the project is complete the Board of Directors will have a clear understanding of the financial state of CMF and a financial sustainability plan that they can approve for implementation.

11.9 PROJECT CHARTER

From: Sheri Buretta [SBuretta@chugach.com]
Sent: Wednesday, March 11, 2015 9:30 PM
To: Angela Totemoff
Subject: Re: Angela Totemoff PM 686A Project Charter - Revised

Hi Angela,
I approve.
Thank you for taking this project on,
Sheri Buretta

Sent from my iPhone

On Feb 20, 2015, at 5:35 PM, "Angela Totemoff" <atotemoff@tatilek.com> wrote:

Project Charter

This Charter authorizes the Copper Mountain Project (CMF) to develop a Financial Analysis and Sustainability Plan that may be adopted by the CMF Board of Directors and implemented by the Shareholder Services Department. A project plan will be developed and submitted to the Project Sponsor for approval. The project plan will include a Scope Statement, Stakeholder Management Plan, Time Management Plan, Change Management Plan, Metrics Management Plan, a Risk Register. All monetary resources need to create the Financial Analysis and Sustainability Plan will be approved by the Project Sponsor, Sheri Buretta, CMF Board member.

The purpose of the Copper Mountain Project is to provide a robust Financial Analysis and Sustainability Plan that includes current organization financial and services analysis, financial development plan, and an operations and management plan. When complete the Copper Mountain Project will increase understanding of the organizations programs and services, and provide a goal for financial growth and sustainability.

The Project will be done in two phases. Phase One will begin on January 16, 2015 with the start of PM 686A, to create the Project Management Plan. Phase one will be complete on April 27, 2015, at the end of the spring 2015 semester. Phase two will begin on August 30, 2015, with the start of PM 686B, to create the Financial Analysis and Sustainability Plan (Product). Phase two will be complete on December 10, 2015, at the end of the fall 2015 semester.

High level risks that could jeopardize the project success include:

- Project Manager is unable to fulfill the University Requirements for the class.
- Project IRB Approval Review is declined due to the nature of the research.
- Project Manager doesn't have the time or resources to complete the project.
- Product created (Financial Analysis and Sustainability Plan) is not in line with Copper Mountain Foundation Mission, Vision Values.
- Copper Mountain Foundation's Strategic planning changes direction, making the Financial Analysis and Sustainability Plan un-useable.

These risks will be considered during the planning phase to ensure there are response/mitigation measures to be taken if needed.

The acceptance criteria for the product (Financial Analysis and Sustainability Plan) will be accepted by the Copper Mountain Foundation Board of Directors if it meets the following criteria:

- All stakeholder requirements have been met or completed and accounted for in the WBS and Project Schedule.

- Financial Analysis and Sustainability Plan is in alignment with the Copper Mountain Foundation Mission, Vision and Values.
- Financial Analysis and Sustainability Plan passed legal and financial reviews.

The following are not included in the scope of this project:

- Implementation of the Financial Analysis and Sustainability Plan
- Completed 12 Month Activities Plan
- Arrangements for Special Board Meeting to approve the Financial Analysis and Sustainability Plan

The Project Manager, Angela Totemoff, is hereby authorized to interface with management as requested, delegate responsibilities within the framework of the project, and to communicate with management and CMF Board Members as required, ensuring successful and timely completion of the project. The Project Manager is responsible for developing a project plan that describes the objectives, deliverables, and implementation plan for the project.

Ms. Totemoff will execute the project plan, monitor progress and performance, and take corrective action if necessary. She will communicate assignments to functional managers and the members of the project team. For the duration of the project, Ms. Totemoff will prepare and present status reports to the Student Advisory Committee every 3 weeks when the Project Progress Milestones (UAA Requirement) are due.

11.10 RESEARCH SOURCES, METHODS, INSTRUMENTS

- Faircloth, Susan C., & Tippeconnic, III, John W. (2010). The Dropout/Graduation Rate Crisis Among American Indian and Alaska Native Students: Failure to Respond Places the Future of Native Peoples at Risk. Los Angeles, CA: The Civil Rights Project/Proyecto Derechos Civiles at UCLA; www.civilrightsproject.ucla.edu.
- Martin, Stephanie, & Hill, Alexandria. (2009). The Changing Economic Status of Alaska Natives, 1970-2000, Note No. 5. Anchorage, AK: Institute of Social and Economic Research University of Alaska; www.iser.uaa.alaska.edu
- General Database of 351 Alaska Natives. All personal identifiable information unknown. Data Collected
 - No. of participants that utilize burial assistance
 - No. of Participants that utilize scholarships
 - Current Education level of Participant
 - Desired Education level of Participant

11.11 IRB APPROVAL DOCUMENTATION

IRB Email Review

As discussed, IRB Review is not needed for the Copper Mountain Project. Below is documentation confirming that the project will not need IRB Review.

Angela Totemoff <aktotemoff@alaska.edu>

Fri, Mar 13, 2015 at 9:40 AM

To: simumaw@uaa.alaska.edu

Hello,

Thank you for meeting with our class on Feb 27. It was very informative and helpful for my project. During the class you mentioned emailing you a brief description of the project to see if it requires a full IRB Proposal Review. Below is a description of my project and the sources that I will be using for my literature review. Thanks for taking the time to look it over. I hope it's not too verbose.

INTRODUCTION

The Copper Mountain Foundation (CMF) is a 501 c3 non-profit that is fully funded, fully operated, and established by The Tatitlek Corporation (TTC). CMF currently has four programs focused on financial assistance for the Shareholders of TTC, for education and career enhancements, culture activities, and end of life expenses. The programs are managed and operated by the TTC Shareholder Services Department.

BUSINESS CASE

Part of the mission statement of The Tatitlek Corporation states that "we strive to bridge the traditions of our village with global economic opportunity enhancing the quality of life for our shareholders." The Copper Mountain Foundation is an important vehicle that provides financial assistance to achieve that goal of enhancing shareholder's lives. Therefore, ensuring that these programs continue to be offered verifies that The Tatitlek Corporation is fulfilling its mission.

PROJECT PURPOSE

CMF currently does not have any full time employees or Board Members focused creating a Financial Analysis and Sustainability Plan to gain financial sustainability. The financial health of TTC has enabled the programs in CMF to be fully funded. However, with decreased government spending and increased competition in the commercial and government business environments, TTC is looking for a balance between becoming a lean business competitor while continuing to offer benefits to the employees and shareholders. This may lead to decrease in funds available to CMF. The goal of financial sustainability ensures that the programs will continue without a decrease in funding.

SCOPE DESCRIPTION

By April 10, 2015, plan and create a project management plan to create a Financial Analysis and Sustainability Plan for the Copper Mountain Foundation that includes current organization financial and services analysis, financial development plan, and an operations and management plan, while incorporating the UAA MSPM 686A course requirements and deadlines. The project management plan will include a complete project scope statement, a schedule management plan, and a stakeholder management plan.

LITERATURE REVIEW

I will be examining the academic and burial challenges that Alaska Natives face. I will examine Alaska Native Settlement Act and its intent to serve the Shareholders of Alaska Native Corporations. I will examine the

importance and utilization of current academic and burial assistance programs in Alaska.

RESEARCH

I will be using the following sources to support my Literature Review.

- Faircloth, Susan C., & Tippeconnic, III, John W. (2010). The Dropout/Graduation Rate Crisis Among American Indian and Alaska Native Students: Failure to Respond Places the Future of Native Peoples at Risk. Los Angeles, CA: The Civil Rights Project/Proyecto Derechos Civiles at UCLA; www.civilrightsproject.ucla.edu.
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- General Database of 351 Alaska Natives. All personal identifiable information unknown. Data included:
 - No. of participants that utilize burial assistance
 - No. of Participants that utilize scholarships
 - Current Education level of Participant
 - Desired Education level of Participant

Sincerely,

Angela Totemoff

[907.351.3322](tel:907.351.3322)

Sharilyn I Mumaw <simumaw@uaa.alaska.edu>

Thu, Mar 19, 2015 at 11:27 PM

To: Angela Totemoff <aktotemoff@alaska.edu>

Angela,

Based upon what you have described here, your project may be research, but it does not involve any interaction with people, so it is not human subjects research and does not need IRB review.

You do briefly mention a stakeholder management plan, but you do not describe any interaction with stakeholders to obtain their input on the plan, which might, depending upon the questions you ask, place that portion of the project into the realm of human subjects research that needs IRB review. If this is the case, you should talk to me further about your project. Otherwise, you do not need IRB review to continue.

Best wishes on your work,

Sharilyn Mumaw, M.P.A.

Research Compliance Officer

Research and Graduate Studies | University of Alaska Anchorage

3211 Providence Drive | DPL 101 | Anchorage, Alaska 99508

simumaw@uaa.alaska.edu | [907-786-1099](tel:907-786-1099)

Angela Totemoff <aktotemoff@alaska.edu>

Sun, Mar 22, 2015 at 3:02 PM

To: Roger Hull <rkhull@uaa.alaska.edu>

Hello Roger,

Attached is the response I got from Sharilyn. If I'm interpreting this correctly, I'll need an IRB Review if I seek input from my stakeholders? As with most PMP's, they require input for stakeholder requirements. Just seems too generalized for me. Can we meet to discuss before I respond to her?

[Quoted text hidden]

Roger K Hull <rkhull@uaa.alaska.edu>

Sun, Mar 22, 2015 at 4:39 PM

To: Angela Totemoff <aktotemoff@alaska.edu>

Angela,

We can certainly meet to discuss, as always, whenever you'd like.

I interpret Sharilyn's message to mean that you do not need IRB review. Asking stakeholders to contribute to establishing requirements and identifying risks is not human subjects research. You do not need to discuss your work any further with Sharilyn, and you do not need to submit a proposal to the IRB.

The only IRB-related task you have is to complete the CITI training and include your certificate in your PPM deliverables. You do not need to submit the training certificate to the IRB.

Regards, Roger

Roger Hull, PMP, CRISC, CISM

Instructor, UAA PM Department

rkhull@uaa.alaska.edu

[907-786-1923](tel:907-786-1923)

[Quoted text hidden]

PROJECT CHARTER

From: Sheri Buretta [SBuretta@chugach.com]
Sent: Wednesday, March 11, 2015 9:30 PM
To: Angela Totemoff
Subject: Re: Angela Totemoff PM 686A Project Charter - Revised

Hi Angela,
I approve.
Thank you for taking this project on,
Sheri Buretta

Sent from my iPhone

On Feb 20, 2015, at 5:35 PM, "Angela Totemoff" <atotemoff@tatitlek.com wrote:

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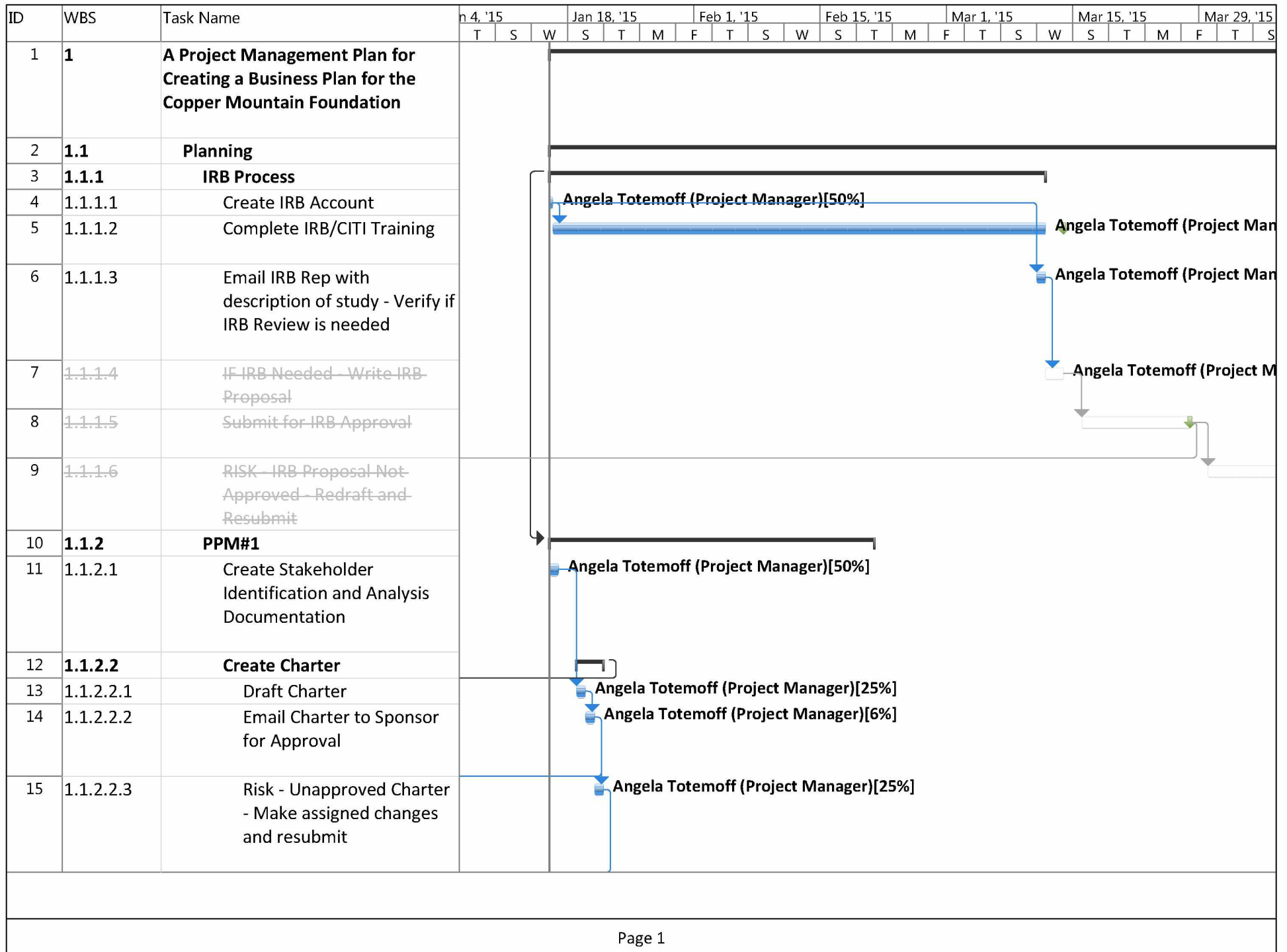
- All stakeholder requirements have been met or completed and accounted for in the WBS and Project Schedule.
- Financial Analysis and Sustainability Plan is in alignment with the Copper Mountain Foundation Mission, Vision and Values.
- Financial Analysis and Sustainability Plan passed legal and financial reviews.

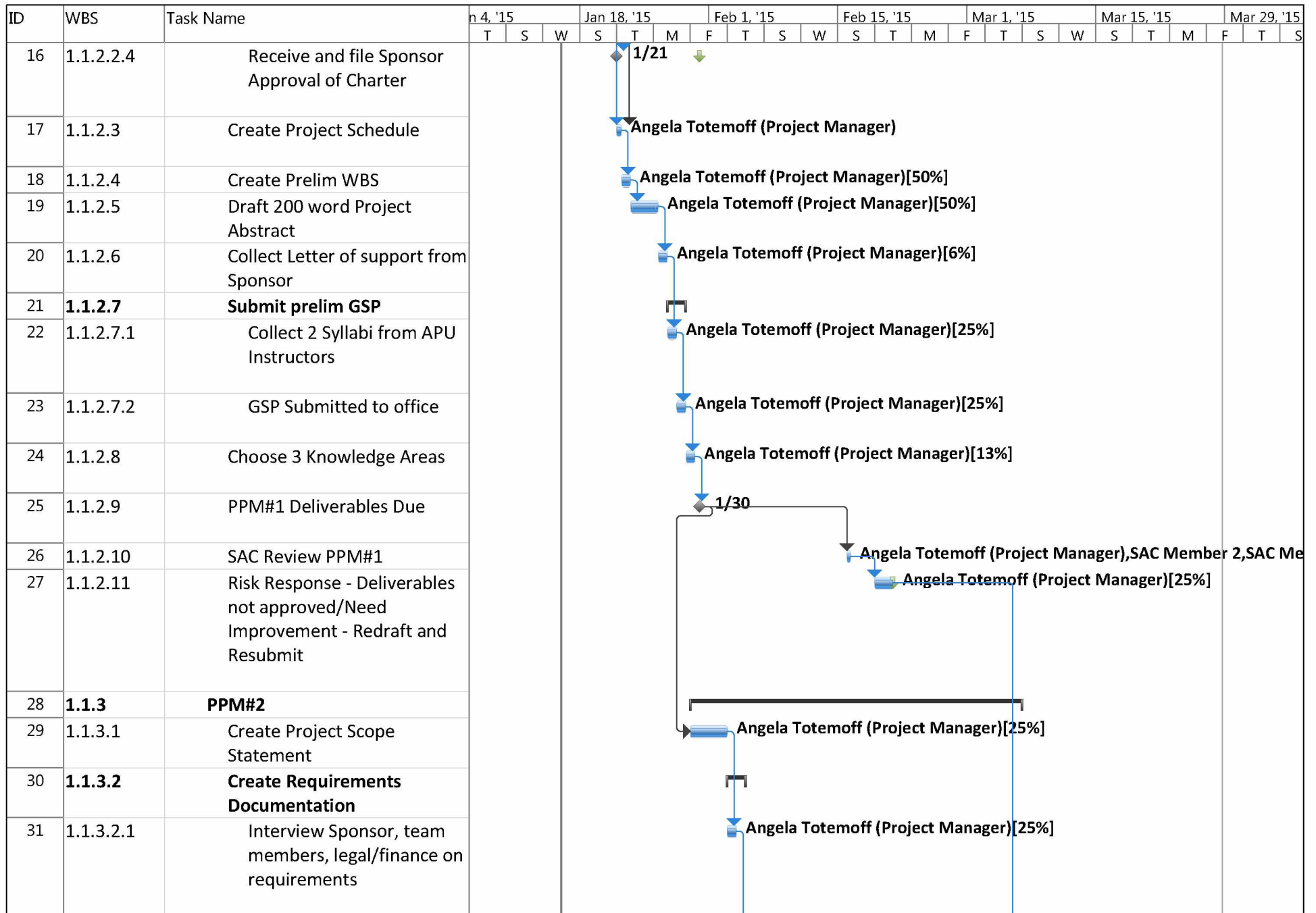
The following are not included in the scope of this project:

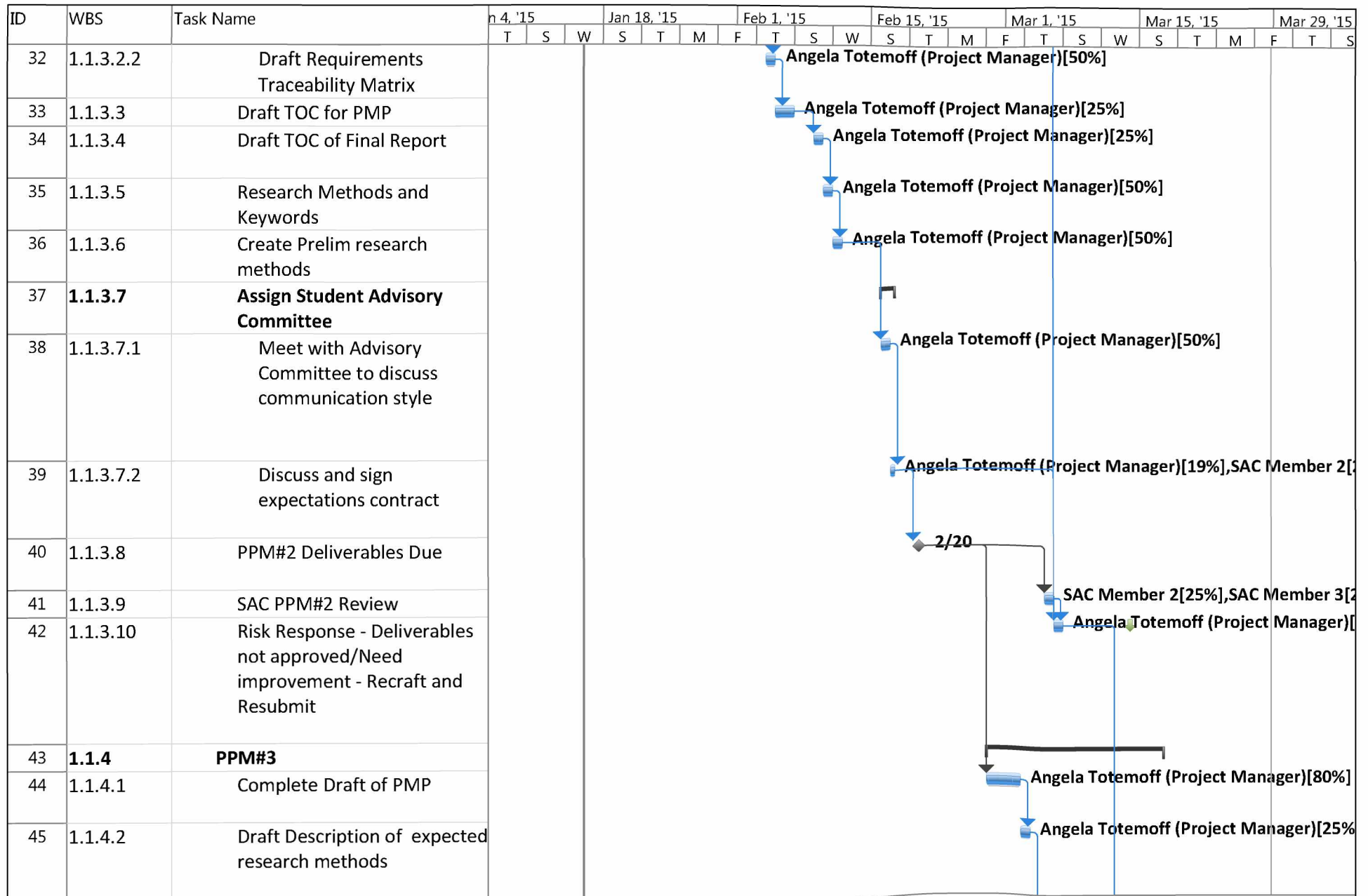
- Implementation of the Financial Analysis and Sustainability Plan
- Completed 12 Month Activities Plan
- Arrangements for Special Board Meeting to approve the Financial Analysis and Sustainability Plan

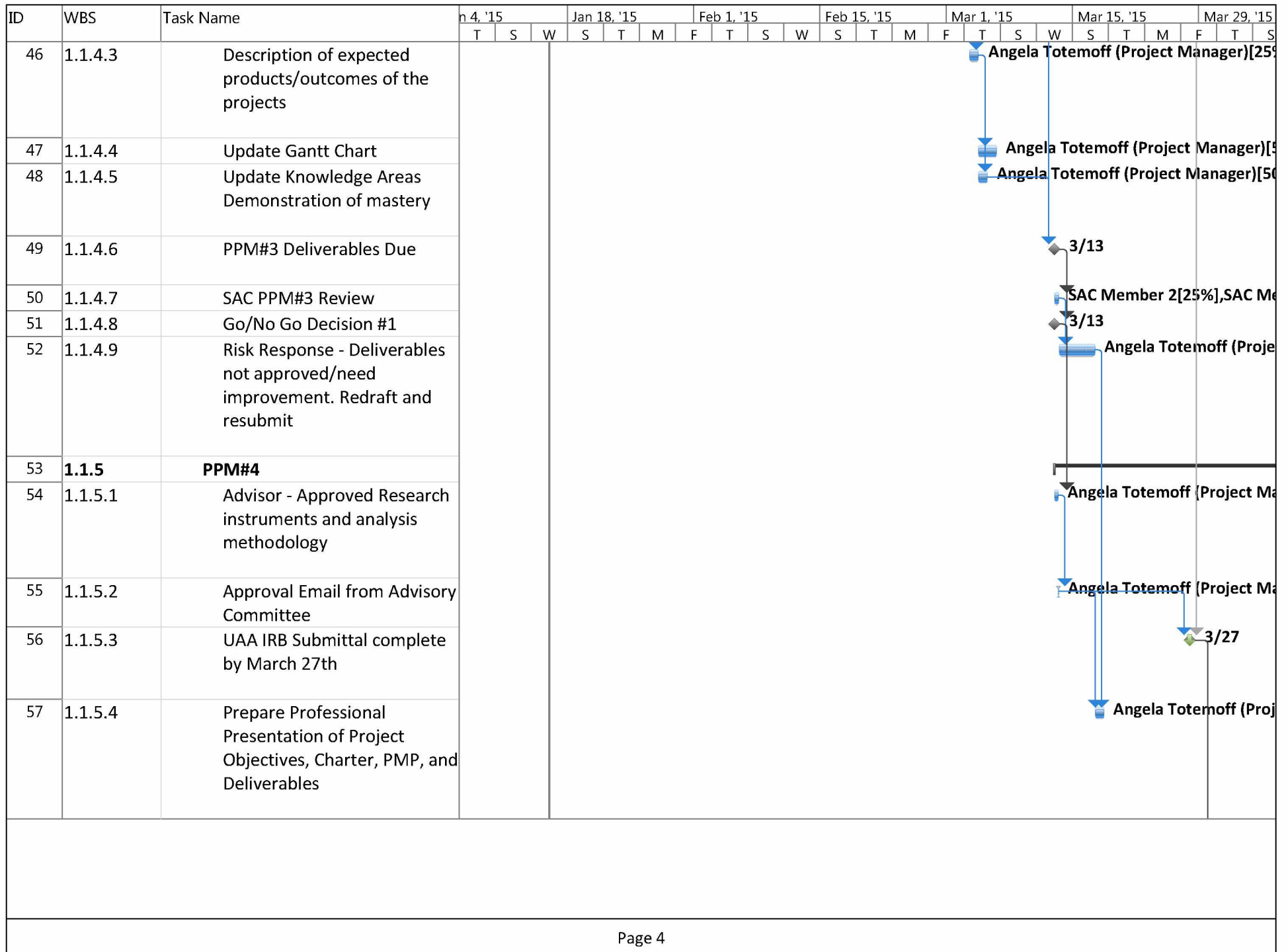
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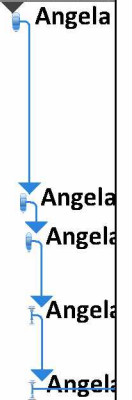
ID	WBS	Task Name	Jan 4, '15			Jan 18, '15			Feb 1, '15				Feb 15, '15			Mar 1, '15				Mar 15, '15				Mar 29, '15			
			T	S	W	S	T	M	F	T	S	W	S	T	M	F	T	S	W	S	T	M	F	T	S		
58	1.1.5.5	Professional Presentation of project objectives, charter, PMP, and Deliverables																									
59	1.1.5.6	Final PMP																									
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72	1.2	Execution																									
73	1.2.1	Literature Review - PPM#1																									
74	1.2.1.1	Collect Literature																									

Angela

Angela

Angela

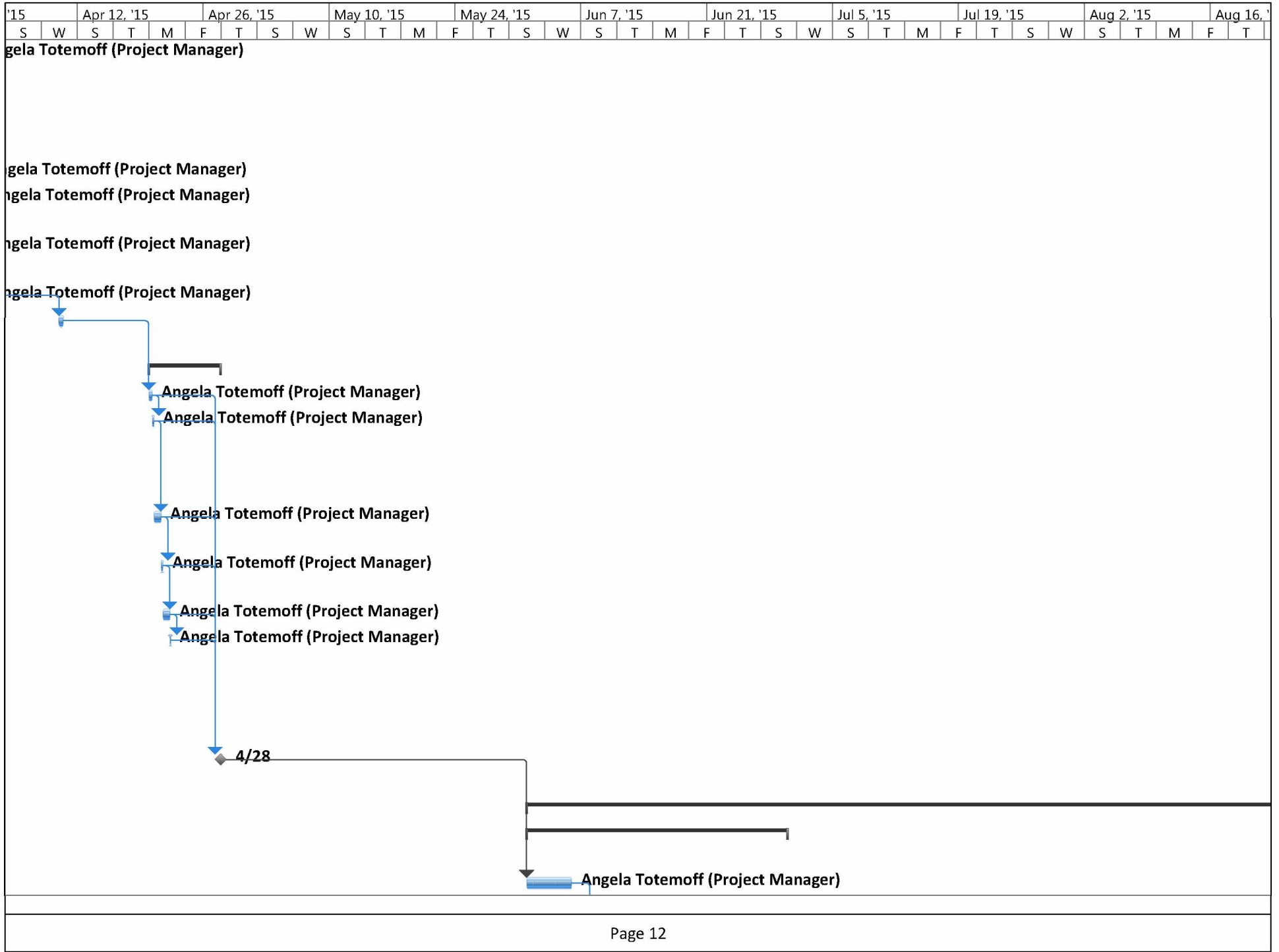
Angela

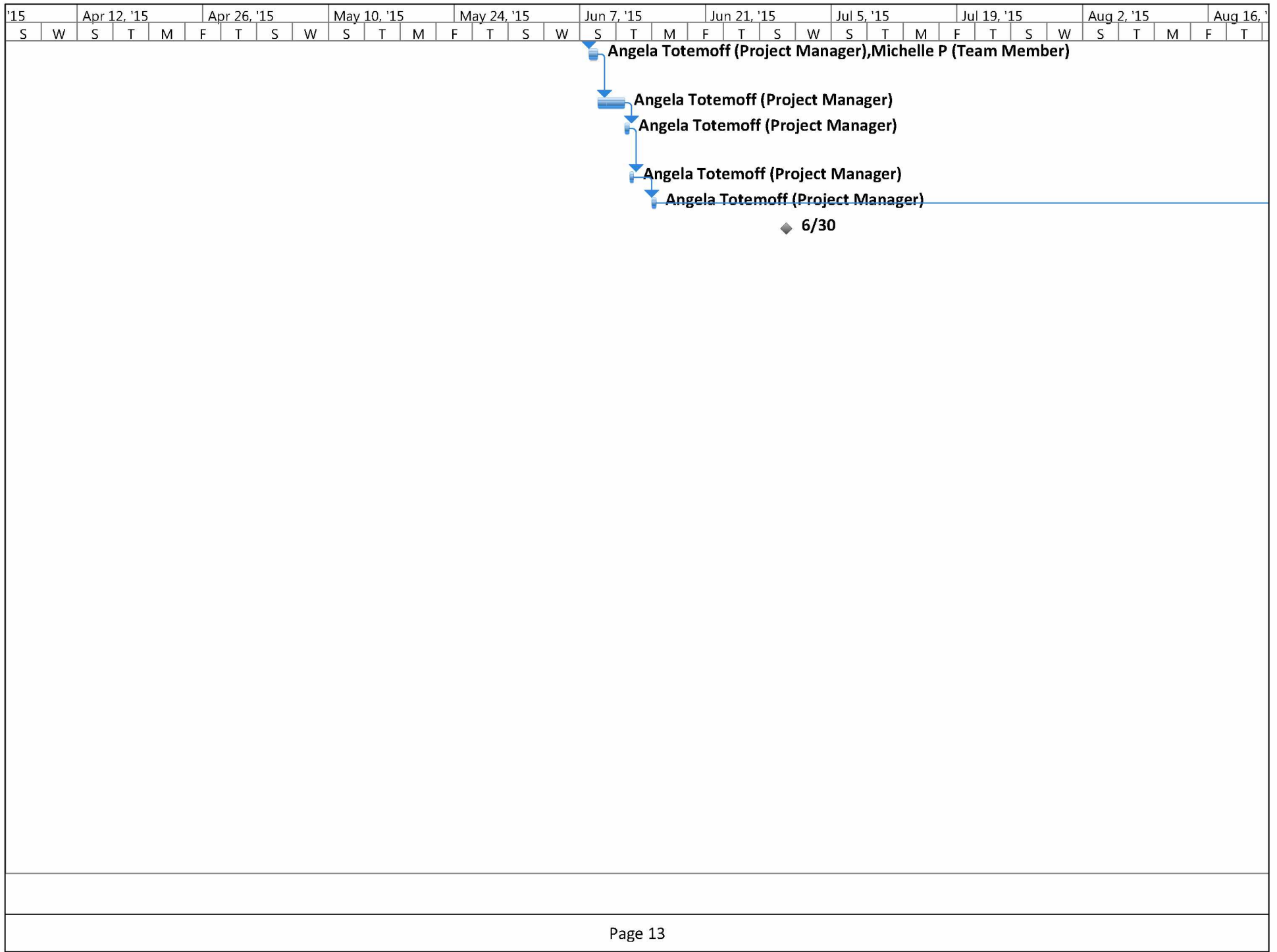


ID	WBS	Task Name	Jan 4, '15			Jan 18, '15			Feb 1, '15				Feb 15, '15			Mar 1, '15				Mar 15, '15				Mar 29, '15			
			T	S	W	S	T	M	F	T	S	W	S	T	M	F	T	S	W	S	T	M	F	T	S		
93	1.2.3.6	Risk Response Implementation																									
94	1.2.3.7	Project Deliverables Status Update																									
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110	1.3.8	Prepare and submit final project deliverables																									
111	1.3.9	Final Product and Research Paper submitted - Project Complete																									

[illegible]

[illegible]





'15			Apr 12, '15				Apr 26, '15				May 10, '15				May 24, '15				Jun 7, '15				Jun 21, '15				Jul 5, '15				Jul 19, '15				Aug 2, '15				Aug 16, '15	
S	W	S	T	M	F	T	S	W	S	T	M	F	T	S	W	S	T	M	F	T	S	W	S	T	M	F	T	S	W	S	T	M	F	T						

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'15		Aug 30, '15			Sep 13, '15			Sep 27, '15			Oct 11, '15			Oct 25, '15			Nov 8, '15			Nov 22, '15			Dec 6, '15			Dec 20, '15			Jan 3, '16																			
S	W	S	T	M	F	T	S	W	S	T	M	F	T	S	W	S	T	M	F	T	S	W	S	T	M	F	T	S	W	S	T	M	F	T														

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'15		Aug 30, '15				Sep 13, '15				Sep 27, '15				Oct 11, '15				Oct 25, '15				Nov 8, '15				Nov 22, '15				Dec 6, '15				Dec 20, '15				Jan 3, '16	
S	W	S	T	M	F	T	S	W	S	T	M	F	T	S	W	S	T	M	F	T	S	W	S	T	M	F	T	S	W	S	T	M	F	T					

'15		Aug 30, '15			Sep 13, '15			Sep 27, '15			Oct 11, '15			Oct 25, '15			Nov 8, '15			Nov 22, '15			Dec 6, '15			Dec 20, '15			Jan 3, '16					
S	W	S	T	M	F	T	S	W	S	T	M	F	T	S	W	S	T	M	F	T	S	W	S	T	M	F	T	S	W	S	T	M	F	T

'15		Aug 30, '15				Sep 13, '15				Sep 27, '15				Oct 11, '15				Oct 25, '15				Nov 8, '15				Nov 22, '15				Dec 6, '15				Dec 20, '15				Jan 3, '16	
S	W	S	T	M	F	T	S	W	S	T	M	F	T	S	W	S	T	M	F	T	S	W	S	T	M	F	T	S	W	S	T	M	F	T					

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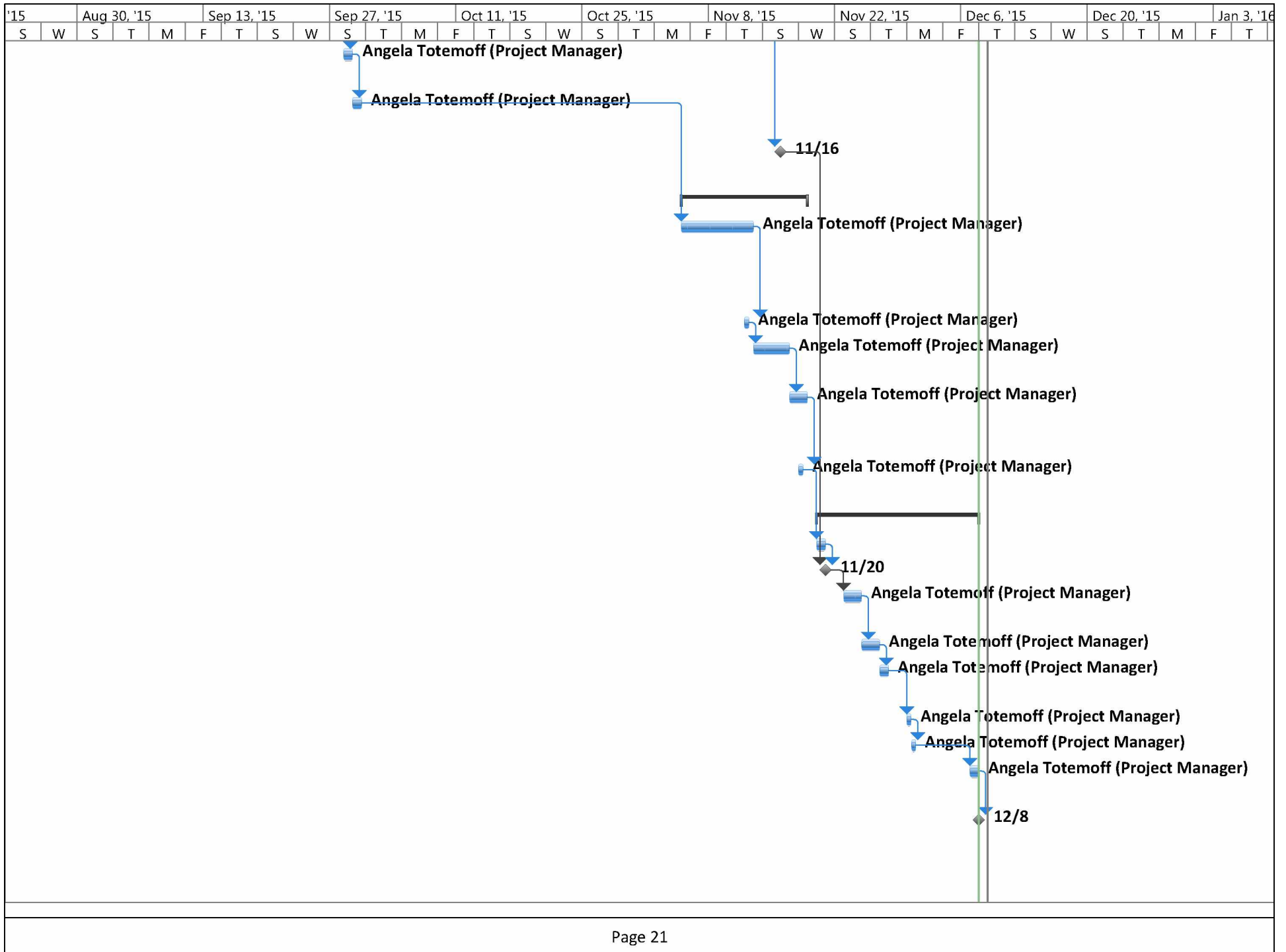
[illegible]

Calendar view showing dates from August 30, '15 to January 3, '16. The timeline includes a series of events for Angela Totemoff (Project Manager) and Legal/Finance, Sponsor, starting on 8/24.




















The timeline shows a series of events for Angela Totemoff (Project Manager) and Legal/Finance, Sponsor, starting on 8/24. The events are represented by blue arrows pointing to the right, indicating the duration of each task. The tasks are:

- Angela Totemoff (Project Manager)
- Angela Totemoff (Project Manager)
- Angela Totemoff (Project Manager)
- Angela Totemoff (Project Manager)
- Angela Totemoff (Project Manager)
- Angela Totemoff (Project Manager)
- Angela Totemoff (Project Manager)
- Legal/Finance, Sponsor
- Angela Totemoff (Project Manager)

The timeline also includes a vertical green line at 8/24, marking the start of the project.





Project: Project Schedule updated Date: Mon 12/7/15	Task		Manual Summary Rollup	
	Split		Manual Summary	
	Milestone		Start-only	
	Summary		Finish-only	
	Project Summary		External Tasks	
	Inactive Task		External Milestone	
	Inactive Milestone		Deadline	
	Inactive Summary		Progress	
	Manual Task		Manual Progress	
	Duration-only			

Risk Realization Report

Project Title: The Copper Mountain Project

Date Prepared: 12/06/2015

Date	ID	Risk	Anticipated Impact	Actual Impact	Trigger	Risk Mitigation	Risk Response
	1	IRB - Unclear understanding of the IRB process that delays the proposal submission	5 Days		By PPM#2 deadline, unable to articulate the IRB process	Attend IRB Review Class session, Complete IRB Training	Meet with SAC Members and IRB Personnel to get more understanding
	2	Lack of understanding of the Final Report that causes delays and poor quality of PPM Submission	4 hrs		By PPM#2, unable to articulate the Final Report	Discuss during PPM Review Tasks	Add additional PM time to task. Meet with SAC Members to clarify understanding
	3	Lack of understanding of the Literature Review, Research Methods, Sources, and Instruments	4 hrs		By PPM#2, unable to articulate PPM Deliverables	Discuss during PPM Review Tasks	Add additional PM time to task. Meet with SAC Members to clarify understanding
	5	Sponsor does not have time to review and approve Project Documents, making PPM's submission incomplete	1.5 days		Charter Approvals late	Add in response time to MS Schedule	Contact Sponsor via email to get a faster response. Add Risk Response time into plan
9/9/2015	9	Loss of Backup	3 days	5 days – Missed appointment with SAC Member	Missing Laptop Cord	NA	Purchased another cord.
10/9/2015	5	Lack of understanding of the Literature Review, Research Methods, Sources, and Instruments	.5 days	5 days – Missed appointment with SAC Member	Working on PPM submission took longer than anticipated.	Start working on the PPM submission sooner	Schedule Crashing
11/9/2015		Delay in Product delivery	0	20 days	Unscheduled events	Add large buffer for large deliverables	Schedule Crashing
11/20/2015		Submission of wrong version of final report		3 hrs	Compiling work from two different work stations	Utilize Google Docs or Blackboard Collaboration Area for Version Control	Rework. Document Retrieval

CHANGE LOG

Project Title: The Copper Mountain Project

Date Prepared: 12/06/2015

Change ID	Category	Description of Change	Submitted by	Submission Date	Status	Disposition
001	Scope	Project was changed from Grant submission for Tatitlek IRA and NPR to Business Plan for Copper Mountain Foundation.	Angela Totemoff (PM)	1/28/2015	Approved	Complete
002	Scope	Market Analysis and Marketing Plan were removed from Business Plan (product) Requirements	Angela Totemoff (PM)	3/5/2015	Approved	Complete
003	Quality	Project Name Change	Angela Totemoff (PM)	3/16/2015	Approved	Complete
004	Quality	Updated PMP	Angela Totemoff (PM)	9/15/2015	Approved	Complete
005	Quality	Updated PMP, Added sub plans: Risk, Scope, Communications and Stakeholder	Angela Totemoff (PM)	9/17/2015	Approved	Complete
006	Quality	Removed Abstract and Research Sources and Methods from PMP	Angela Totemoff	10/9/2015	Approved	Complete

CHANGE REQUEST

A Project Management Plan to
create a Business Plan for the

Project Title: Copper Mountain Foundation

Date Prepared: 1/2815

Person Requesting Change: Angela Totemoff

Change Number: 001

Category of Change:



Scope



Quality



Requirements



Cost



Schedule



Documents

Detailed Description of Proposed Change:

Change Scope.

Original Scope: Prepare and submit a grant on behalf of North Pacific Rim and the Tatitlek IRA Council for Teacher housing in Tatitlek, AK.

New Scope: Create a PMP to build a Business Plan for the Copper Mountain Foundation, a 501c3, owned, operated and fully funded by The Tatitlek Corporation.

Justification for Proposed Change:

It was determined that writing and submitting a grant on behalf of an organization for a Tatitlek IRA Council, to an agency trying to receive federal funding, ran the risk of failing due to limited resources and time constraints. The ICDBG grant proposal needs the full participation of all organizations to ensure success. This was out of the scope for 686A.

Impacts of Change:

Scope	<input checked="" type="checkbox"/> Increase	<input type="checkbox"/> Decrease	<input type="checkbox"/> Modify
Description: New project will be done within an organization where PM has more decision making control and more resources and expertise.			
Quality	<input type="checkbox"/> Increase	<input type="checkbox"/> Decrease	<input type="checkbox"/> Modify
Description:			
Requirements	<input type="checkbox"/> Increase	<input type="checkbox"/> Decrease	<input type="checkbox"/> Modify
Description:			
Cost	<input type="checkbox"/> Increase	<input type="checkbox"/> Decrease	<input type="checkbox"/> Modify
Description:			
Schedule	<input type="checkbox"/> Increase	<input type="checkbox"/> Decrease	<input type="checkbox"/> Modify
Description:			
Project Documents:			



CHANGE REQUEST

Comments:

Disposition



Approve

☐

Defer

☐

Reject

Justification:

Must set PM up for success for the project and product.

Change Control Signatures:

Angela Totemoff, PM

By: _____//Angela Totemoff_____

Date: 1/28/2015

CHANGE REQUEST

A Project Management Plan to
create a Business Plan for the

Project Title: Copper Mountain Foundation

Date Prepared: 3/5/2015

Person Requesting Change: Angela Totemoff

Change Number: 002

Category of Change:



Scope



Quality



Requirements



Cost



Schedule



Documents

Detailed Description of Proposed Change:

Change Scope.

Original Scope: Business Plan would include Current Marketing Analysis and Marketing Plan

New Scope: Marketing portion was removed from Product requirements.

Justification for Proposed Change:

During a discussion with Sponsor and OSIYO (Org Dev Stakeholder), it was determined that the marketing portion of the product should be done by an outside consultant since the quality level needed for that portion exceeded PM's expertise.

Impacts of Change:

Scope



Increase



Decrease



Modify

Description: Remove Marketing Portion.

Quality



Increase



Decrease



Modify

Description:

Requirements



Increase



Decrease



Modify

Description:

Cost



Increase



Decrease



Modify

Description:

Schedule



Increase



Decrease



Modify

Description:

Project Documents:

Comments:

CHANGE REQUEST

Disposition



Approve



Defer



Reject

Justification:

Must set PM up for success for the project and product.

Change Control Signatures:

Angela Totemoff, PM

By: _____//Angela Totemoff_____

Date: 1/28/2015

CHANGE REQUEST

Financial Analysis and
Sustainability Plan for the Copper

Project Title: Mountain Foundation, a 501c3

Date Prepared: 3/16/2015

Person Requesting Change: Angela Totemoff

Change Number: 003

Category of Change:

☐

Scope



Quality

☐

Requirements

☐

Cost

☐

Schedule

☐

Documents

Detailed Description of Proposed Change:

Name Change.

Justification for Proposed Change:

Name was more descriptive of what the project was about.

Impacts of Change:

Scope

☐

Increase

☐

Decrease

☐

Modify

Description:

Quality



Increase

☐

Decrease

☐

Modify

Description:

Requirements

☐

Increase

☐

Decrease

☐

Modify

Description:

Cost

☐

Increase

☐

Decrease

☐

Modify

Description:

Schedule

☐

Increase

☐

Decrease

☐

Modify

Description:

Project Documents:

Comments:

Disposition



Approve

☐

Defer

☐

Reject

CHANGE REQUEST

Justification:

Must set PM up for success for the project and product.

Change Control Signatures:

Angela Totemoff, PM

By: _____//Angela Totemoff_____

Date: 3/16/2015

CHANGE REQUEST

Project Title: The Copper Mountain Project

Date Prepared: 9/15/2015

Person Requesting Change: Angela Totemoff

Change Number: 004

Category of Change:

☐

Scope



Quality

☐

Requirements

☐

Cost

☐

Schedule

☐

Documents

Detailed Description of Proposed Change:

Updated PMP to include new format, added version control, updated risk register, and stakeholder analysis.

Justification for Proposed Change:

It was determined that updating the PMP was vital to proper project management practices.

Impacts of Change:

Scope

☐

Increase

☐

Decrease

☐

Modify

Description:

Quality



Increase

☐

Decrease

☐

Modify

Description: Updated PMP accurately reflects project.

Requirements

☐

Increase

☐

Decrease

☐

Modify

Description:

Cost

☐

Increase

☐

Decrease

☐

Modify

Description:

Schedule

☐

Increase

☐

Decrease

☐

Modify

Description:

Project Documents: PMP

Comments:

Disposition



Approve

☐

Defer

☐

Reject

Change Control Signatures:

CHANGE REQUEST

Angela Totemoff, PM

By: _____//Angela Totemoff_____

Date: 9/15/2015

CHANGE REQUEST

Project Title: The Copper Mountain Project

Date Prepared: 9/15/2015

Person Requesting Change: Angela Totemoff

Change Number: 005

Category of Change:

☐

Scope



Quality

☐

Requirements

☐

Cost

☐

Schedule

☐

Documents

Detailed Description of Proposed Change:

Updated PMP to include new format, added version control, updated risk register, and stakeholder analysis.

Justification for Proposed Change:

It was determined that updating the PMP was vital to proper project management practices.

Impacts of Change:

Scope

☐

Increase

☐

Decrease

☐

Modify

Description:

Quality



Increase

☐

Decrease

☐

Modify

Description: Updated PMP accurately reflects project.

Requirements

☐

Increase

☐

Decrease

☐

Modify

Description:

Cost

☐

Increase

☐

Decrease

☐

Modify

Description:

Schedule

☐

Increase

☐

Decrease

☐

Modify

Description:

Project Documents: PMP

Comments:

Disposition



Approve

☐

Defer

☐

Reject

Change Control Signatures:

CHANGE REQUEST

Angela Totemoff, PM

By: _____//Angela Totemoff_____

Date: 9/15/2015

CHANGE REQUEST

Project Title: The Copper Mountain Project

Date Prepared: 10/9/2015

Person Requesting Change: Angela Totemoff

Change Number: 006

Category of Change:

☐

Scope



Quality

☐

Requirements

☐

Cost

☐

Schedule

☐

Documents

Detailed Description of Proposed Change:

Updated PMP, removed research methods and abstract.

Justification for Proposed Change:

These sections belong in the final report.

Impacts of Change:

Scope

☐

Increase

☐

Decrease

☐

Modify

Description:

Quality



Increase

☐

Decrease

☐

Modify

Description: Made a more comprehensive plan.

Requirements

☐

Increase

☐

Decrease

☐

Modify

Description:

Cost

☐

Increase

☐

Decrease

☐

Modify

Description:

Schedule

☐

Increase

☐

Decrease

☐

Modify

Description:

Project Documents:

Comments:

Disposition



Approve

☐

Defer

☐

Reject

Justification:

Must set PM up for success for the project and product.

CHANGE REQUEST

Change Control Signatures:

Angela Totemoff, PM

By: _____//Angela Totemoff_____

Date: 10/9/2015

Progress Report #1

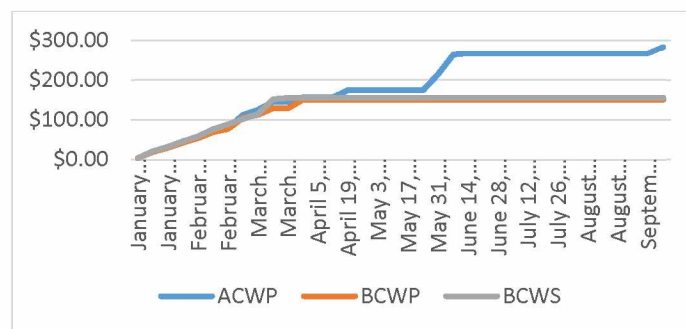
1 THRESHOLDS

KEY PERFORMANCE INDICATORS	THRESHOLDS	MET?
SCHEDULE VARIANCE INDEX (SPI)	<0.75	Not met
COST PERFORMANCE INDEX (CPI)	>1.25	Not met
PLANNED VALUE (PV)	Variances accounted for.	
ACTUAL COST CURVE (AC)		
EARNED VALUE CURVE (EV)		

2 SCHEDULE AND COST PERFORMANCE

% COMPLETE	CPI	CV%	SPI	SV%	TCPI	EAC
78%	0.9	-11%	0.98	-2%	1.41	\$171.23

3 EVM REPORT



4 LATE TASKS

None. MS Project is calculating inactive tasks as late.

5 UPCOMING TASKS

NAME	RESOURCE NAMES	START	FINISH	WORK
Update abstract, ToC, Research sources, keywords	Angela Totemoff (Project Manager)	Mon 9/21/15	Mon 9/21/15	8 hrs
Validated research analysis - Needs Advisor analysis	Angela Totemoff (Project Manager)	Tue 9/22/15	Tue 9/22/15	4 hrs
Project progress status – Complete CMF Project	Angela Totemoff (Project Manager)	Wed 9/23/15	9/30/15	7 hrs

6 RISK AND CHANGE LOG

See complete Risk and Change logs in attachments.

Progress Report #2

1 THRESHOLDS

KEY PERFORMANCE INDICATORS	THRESHOLDS	MET?
SCHEDULE VARIANCE INDEX (SPI)	<0.75	Not met
COST PERFORMANCE INDEX (CPI)	>1.25	The index has a .53 value due to schedule crashing. More effort was needed to complete PPM on time.
PLANNED VALUE (PV)	Variances accounted for.	
ACTUAL COST CURVE (AC)		
EARNED VALUE CURVE (EV)		

2 SCHEDULE AND COST PERFORMANCE

% COMPLETE	CPI	CV%	SPI	SV%	TCPI	EAC
85%	0.46	-87%	0.97	-3%	-.03	\$289.22

3 EVM REPORT



4 LATE TASKS

Product Development Complete – Will be completed by Oct 14, 2015.

5 UPCOMING TASKS

NAME	RESOURCE NAMES	START	FINISH	WORK
Working Draft, complete and properly formatted	Angela Totemoff	10/12/2015	10/16/2015	

6 RISK AND CHANGE LOG

See complete Risk and Change logs in attachments.

Angela Totemoff

Expectations for PM 686A and 686B Capstone Project Advising

Student Name: Angela Totemoff **PM 686A** or **PM 6896B** (Circle one) **Semester:** Fall 2015

Area of Responsibility	Student	Primary Advisor (1 person)	Committee Members (2 people)	Instructor of Record (IOR) and Admin Staff
Project Management	PRIMARY OWNER	Coaching, feedback and assessment	Coaching, feedback and assessment input	
Communication and Stakeholder Management	<ul style="list-style-type: none">• Clear description of project• Proactive selection of Advisor and Committee members• Demonstrate effective communication and stakeholder management by determining and coordinating necessary and agreed modes and setting expectations for timing, and emphasis or tailoring of feedback and communication across with PA and committee (and other stakeholders)• Provide regular status reports as agreed with PA and committee• Identify and resolve communication issues• Identify, balance and resolve	<ul style="list-style-type: none">• Email confirmation of agreement to serve• Availability as agreed	<ul style="list-style-type: none">• Email confirmation of agreement to serve• Availability as agreed	<ul style="list-style-type: none">• Faculty specialties matrix• Session Lectures• Syllabus• Blackboard materials• Announcements• AV set up• Final presentation schedule and logistics• Student and committee support as requested• Adjunct Faculty appointment letters• Escalation path

	<ul style="list-style-type: none"> contradictory inputs Discuss and get signatures for "Expectations" from student, advisor and committee members and submit to PM office. 			
Project Deliverables	<ul style="list-style-type: none"> Complete work per syllabus Incorporate feedback from PA, committee and stakeholders 			
Feedback	<ul style="list-style-type: none"> Determine type, timing and format of feedback from PA and committee Solicit, coordinate and integrate feedback from stakeholders, PA and committee for PPMs and final project deliverables Identify, balance and resolve contradictory inputs 	Provide agreed feedback on timely basis	Provide agreed feedback on timely basis	
Final Presentation	<ul style="list-style-type: none"> Prepare Present 	<ul style="list-style-type: none"> Attend Provide Feedback 	<ul style="list-style-type: none"> Attend Provide Feedback 	<ul style="list-style-type: none"> Coordinate schedule and logistics
Assessment and Grading		<ul style="list-style-type: none"> Coordinate input from committee for 4 PPMs and final 	Provide input to primary advisor for: 4 PPMs Final deliverables	<ul style="list-style-type: none"> Input 4 PPMs and final deliverables scores to Blackboard

		project deliverables <ul style="list-style-type: none"> • Assignment of PPM scores • Provide scores to IOR • Go/No checkpoint recommendation • Assign final grade 	Go/No checkpoints	<ul style="list-style-type: none"> • Ensure consistency across students • Communicate go/no-go decisions to students • Input final grade to UA Online
Administrative Documents	<ul style="list-style-type: none"> • GSP preparation and submission to PM Office • Signed Expectations agreement • IRB submittal (686A) • Apply for graduation (686B) • RSVP for Hooding and commencement (686B) 			<ul style="list-style-type: none"> • Graduate Studies Plan (GSP signatures and processing) • Include signed "Expectations" form in student file. • DF paperwork and annual progress report for students • Graduation Audit • Graduation Requirement Report (GRR) • Archive final project deliverables

Student is responsible for obtaining the following signatures and submitting completed form to PM office to include in student file.

I understand and agree to the expectations described above:

Student Signature: _____

Date: _____

Advisor Signature: _____

Date: _____

Committee Member: _____

Date: _____

Committee Member: _____

Date: _____